Learning for Active Ageing and Intergenerational Learning: Final Report

DG Education and Culture

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Contents

Annexes 2 (Grundtvig Projects Compendium and Analysis), 3 (Case Studies) and 4 (Policy Briefs) are located in separate documents.

1   Introduction

This study is intended to improve and extend the available knowledge about learning for active ageing and the role of intergenerational learning in active ageing. It brings together key findings from academic and other literature on the subject identified up to the end of May 2012, primary and secondary sources collected for 22 case studies, and material created by activities and projects funded through the European Commission's Grundtvig programme actions. This report brings together and summarises the key findings of the literature review, case studies and analysis of Grundtvig programme funded projects to demonstrate the benefits of investing in and supporting learning for older people, how these benefits can be realised and what can be done to achieve them more widely.

1.1   Relevance of the study

The economic crisis and the demographic changes affecting Europe have both highlighted the importance of adult learning and lifelong learning to address some of the key challenges they raise:

- As a result of the economic crisis there is growing unemployment among older workers, particularly among low-skilled older workers. In addition, the falling value of pensions and raising of pensionable ages, can result in older workers postponing their retirement. Older workers require re-skilling and up-skilling to remain in employment and maintain their productivity;

- As a result of demographic changes there is a gradually shrinking workforce as retirees outnumber new entrants. Moreover, the increasing number of older people not in work puts pressure on the health and social services. Older people require skills and competences not just for work but for volunteering, preparing for retirement and for maintaining their independence.

The ageing population also brings opportunities because older people today are healthier than their forebears and should be able to remain in work and as active citizens for longer. Many of the 'baby boom generation' now retiring have more disposable income than ever before and can afford to spend some money on their learning.

The European Union (EU) has recognised the significance of these trends for its policies and actions.

The 2006 Communication[1], *It is never too late to learn*, drew attention to the changing demographic situation and also the need for "active ageing" policies addressing life both before and after retiring from formal work. It described the challenge for adult learning systems as two-fold: a need for up-skilling and increasing lifelong learning opportunities for older workers to ensure a longer working life; and the expansion of learning provision for retired people (including increasing participation of mature students in higher education), as people are reaching retirement in better physical and mental health, and post-retirement life expectancy is extending.

The Commission's 2009 Communication on dealing with the impact of an ageing population presented age related expenditure projections and the challenges of an ageing population showing the significant impact of ageing on the rising cost of state pensions, health care and long term care across Europe.[2] It invited Member States and the Commission to '*develop common principles for active ageing which would help public authorities and stakeholders at all levels to pursue active ageing policies, while taking into account the growing diversity of older people*'.

In relation to education and training, the Commission's Education and Training 2020 Work Programme calls for a lifelong approach to learning and systems which respond to change and for people's skills and competences to be updated over a lifetime for employment and active citizenship.[3] It recognises the challenges of establishing lifelong learning as a key concept in the EU and of meeting the needs of groups such as older workers, through targeted approaches. In 2011, the Council Resolution on the Renewed European agenda for Adult Learning includes in its priorities for 2012-14 a point on '*enhancing learning opportunities for older workers in the context of active ageing, including volunteering and the*

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promotion of innovative forms of intergenerational learning and initiatives to exploit the knowledge, skills and competences for older people for the benefit of society as a whole'.[4]

This resolution also called for greater awareness among adults that learning is a lifelong endeavour, that there should be lifelong guidance systems for adults and flexible arrangements to meet different learning needs including *'for seniors in order to promote active, autonomous and healthy ageing'* and as *'means for fostering solidarity between different age groups'.*

While the Europe 2020 strategy has not set any specific target for the employment of older workers, it explicitly recognises that the general employment target of 75% for women and men aged between 20 and 64 in 2020 can only be achieved by raising the employment rate of older workers. The Agenda for New Skills and Jobs,[5] a Europe 2020 key initiative, acknowledges the importance of prolonging the working lives of older people and calls on Member States to adopt a more targeted approach to lifelong learning and career guidance to ensure that more vulnerable groups, including older workers, are able to benefit.[6]

The European Employment Strategy[7] promotes the employment of older workers including adapting working conditions to meet their needs, adopting age management strategies to prolong older workers' employment, and the use of the European Social Fund to promote active ageing and longer working lives[8]. Training and the skills of older workers are seen to be central to these ambitions.

In relation to health, the EU's Health Strategy 2008-2013[9] has as its first objective *Fostering good health in an ageing Europe,* and The Second Programme of Community Action in the Field of Health 2008-2013[10] supports activities for older people under the theme of *promoting health and reducing health inequalities* to increase healthy life years and healthy ageing.[11] In 2009, the Council adopted Conclusions on Healthy and Dignified Ageing to promote health education within the EU as part of the strategy to tackle ill health which can reduce people's healthy life years[12].

EU Member States are also implementing the Madrid International Plan of Action on Ageing (MIPAA) agreed at the United Nations Second World Assembly on Ageing in Madrid in 2002[13]. Although the document is non-binding, countries have committed to integrate the rights and needs of older people into national policies and have also committed to reporting progress on a five year cycle. The MIPPA initially focused on creating sustainable social protection systems, future-proofing healthcare in light of future demand, improving access to transport and to buildings – rather than on learning and training. This is reflected in the first round of progress reports submitted by EU Member States in 2007 when very few countries reported on actions related to learning, training or intergenerational practice[14]. Nonetheless, second progress reports submitted in 2012 indicate greater awareness of the contribution of learning to active ageing with a greater number of EU governments reporting actions in this sphere[15].

As a consequence active ageing is high on the policy agenda and learning is recognised to be one of the pillars which can support active ageing.

1.2   Method

The study draws on two literature reviews (on active ageing and learning and on intergenerational learning), an analysis of Grundtvig projects which have supported active ageing and intergenerational learning, and two sets of case studies (one on regulatory and policy frameworks stimulating learning for older people, the other on good practice in intergenerational learning) and brings the results of these together into this summary report.

The literature reviews were wide ranging and included published material from Europe and countries in North America, Asia and Australasia. The published material included studies in books and peer reviewed journals, government and government agency research, and the research of networks, research groups and non-governmental organisations. Key studies had empirical evidence of the outputs and outcomes of learning or intergenerational learning for people aged 50 and over which demonstrated the value and benefits of the learning for them and wider society, and how education and training systems brought these positive benefits about.

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There are few quantitative studies of older beneficiaries of learning or intergenerational learning which tracked impacts and sustained outcomes to draw upon. Equally there were few evaluation studies which established control groups to compare outcomes with non-participating older people.

The Grundtvig projects analysis identified 94 projects which could be used to draw out the learning outcomes they had achieved, how they were effectively engaging older people and how they were building the capacity of education and training systems.

The case studies were identified from the literature, the advice of expert advisors, and the Grundtvig projects analysis. For each of these 22 case studies further research was carried out along with interviews of participants and policy makers and the use of published and unpublished documentary material provided. They provide a diverse range of contexts in Europe and elsewhere (the United States, Canada, Hong Kong and Japan).

For the purposes of this study as a whole the following definitions apply:

- Older people are those aged 50 and over;
- Intergenerational learning had to involve those aged 50 and over specifically (not as part of a mixed group of adults) and excludes learning involving parents and their children together even if all the parents were aged over 50;
- The European Reference Framework of Key Competences for Lifelong Learning[16] provided a statement of knowledge, skills and attitudes that could be expected from learning and intergenerational learning; and
- The following definition of intergenerational learning is used: *'Intergenerational learning involves people of different generations becoming engaged in learning from each other and learning together. Learning is the communication and acquisition of knowledge, skills and values'.*

1.3   Structure of the report

In chapter 2 the research is summarised to set out why learning for active ageing is important and how it can be enhanced including policy considerations. In chapter 3 the research is summarised to set out how intergenerational learning is important and how it can be enhanced including policy considerations. Annex 1 contains a complete list of the literature used in this study. Annex 2 contains the compendium and analysis of Grundtvig projects. Annex 3 contains the written up case studies. Annex 4 contains the policy briefs produced for the Conference "One Step Up in Later Life: learning for active ageing and intergenerational solidarity" , organised by the European Commission, DG Education and Culture, in Brussels on 19-21 November 2012, as part of the implementation of the European Agenda for Adult Learning.

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[1] COM (2006) 614, 23 October 2006, 23.10.2006. http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2006:0614:FIN:EN:PDF

[2] COM (2009) 180, 29 April 2009. See also European Commission Discussion Paper Healthy ageing: keystone for a sustainable Europe (2007)

[3] Education and Training 2020 Work Programme (Council Conclusions 2009/C 119/02)

[4] Council Resolution 17 November 2011 (16743/11)

[5] Communication from the Commission, "An Agenda for New Skills and Jobs: A European contribution towards full employment", Strasbourg 23.11.2010, COM (2010)682 final. http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:0682:FIN:EN:PDF

[6] Communication from the Commission, "An Agenda for New Skills and Jobs: A European contribution towards full employment", Strasbourg 23.11.2010, COM (2010)682 final. http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:0682:FIN:EN:PDF

[7] http://ec.europa.eu/social/main.jsp?catId=101&langId=en

[8] ECORYS for DG EMPLOY (2012), Evaluation of the ESF support to Lifelong Learning, http://ec.europa.eu/social/BlobServlet?docId=7922&langId=en

[9] http://ec.europa.eu/health/strategy/policy/index_en.htm

[10] http://ec.europa.eu/health/programme/policy/2008-2013/index_en.htm

[11] http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2007:301:0003:0013:EN:PDF

[12] http://www.salute.gov.it/imgs/C_17_pagineAree_2406_listaFile_itemName_2_file.pdf

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http://social.un.org/index/Ageing/MadridPlanofActionanditsImplementation/ReviewandAppraisaloftheMIPAA.aspx

14 http://www.unece.org/pau/age/mica2007/country_reports_2007.html

15 http://www.unece.org/pau/age/mica2011/country_reports_2012.html

16 http://ec.europa.eu/education/lifelong-learning-policy/key_en.htm

2   Learning and Active Ageing

Lifelong learning is considered to be important throughout the European Union to support economic growth, social inclusion and active citizenship, as well as personal development. Older adults aged over 50 are not excluded from this.[17] There are significant and rising challenges in meeting older people's needs for learning and ensuring that they participate in learning throughout their later years, which are becoming an increasing long period of their lives.

1.1   Why is learning for older people important?

1.1.1   Demographic, social and economic trends in Europe

People in Europe are living longer and enjoying better health into older ages than previous generations. At the same time the baby boomer generation is reaching old age. Together these trends are increasing the proportion of older people in the population as a whole, the ratio of dependent to employed people, and the ratio of older to younger workers in the workforce across Europe. These changes have significant implications for economic growth and public spending at a time when these have been severely affected by the economic downturn.

> In **Germany**, the working age population is predicted to shrink from 50 million in 2009 to 42 or 43 million in 2030 and the age-dependency ratio is expected to rise accordingly throughout this period while **France** has one of the lowest employment rates for those aged over 50 in Europe.[18] Statistical projections show that the share of the European population aged 60 and above will increase from 21% in 2005 to 27% in 2020, and it is anticipated that by 2050 more than a third of the population will be aged 60 and above. [19]

Economic trends are also increasing the proportion of older workers in the workforce with the employment rate among those aged over 50 rising in most European countries.[20] Reasons for this include Member States raising the pensionable age for both men and women, redundancy not being linked to early retirement packages by employers, and people lacking sufficient savings to allow for early retirement.

> In the **UK** there is now a growing number of men and women who are continuing to work longer into their 60s and beyond. The proportion of older people in the workforce (those aged over 50) has risen from 57% to 65% between 2002 and 2010, and over the same period the proportion of those aged over 64 in the workforce rose from 5.5% to 9%.[21]

While the employment rate for older workers has been rising in many European countries, the unemployment rate of older workers has also increased (Eurostat). Older workers are identified as a group at particular risk of losing their job and of not being able to get another job once they have lost one. Unemployment is a burden on the public purse through payments for welfare benefits and social insurance contributions. Furthermore, they represent a loss of skilled and experienced workforce resulting in shortages and gaps in the skills necessary for economic growth.

At the same time with people living to relatively older ages, there is an increasing strain on the provision of healthcare across Europe. This not only comes from the increasing number of older people with chronic diseases which can be treated but an increasing prevalence of some chronic diseases, such as diabetes and dementia.[22] According to World Bank figures, public expenditure on healthcare (treatments, nursing care and home support) in the EU could increase from 8% of GDP in 2000 to 14% in 2030,[23] fuelled largely by an ageing population and a related rise in the treatment of chronic diseases if there were no actions to reduce ill health and dependency on health services.

> The majority of people over the age of 65 in the **United States of America** (US) suffer from at least one chronic condition (91% have one chronic condition, and 73% have at least two[24]). Data shows that as an individual's number of chronic conditions increases,

there is a rise in:

"Adverse outcomes including poor functional status, unnecessary hospitalisations, adverse drug events, duplicative tests, and conflicting medical advice – all of which lead to higher health costs and greater outlays for programmes like Medicare and Medicaid."[25]

Treatment of chronic conditions accounts for 75% of all US spending on healthcare.

Older people's active civic participation is a mainstay of voluntary and community services in Europe which benefit older people specifically, and the wider population generally. While the growing numbers of retired and healthy older people have provided a rich source of volunteers, economic trends which are discouraging early retirement and reducing the value of pensions are likely to lower the numbers involved in volunteering, in addition to the younger generations of older people who may be less accustomed to volunteering throughout their lifetime.

Older people make a significant contribution to volunteering. Data from the 2004 **Survey of Health Ageing and Retirement in Europe (SHARE)** indicated that about 10% of Europeans aged over 50 are engaged in voluntary work.[26] The overall level of volunteering among older people has increased in the last ten years though this may be dipping where older people are postponing retirement.[27]

In addition life transitions for older people are becoming less predictable. This includes changes in employment with the decline in "careers for life" and the rise in "portfolio careers", as well as changes in family arrangements with older people having care responsibilities for children later in life and for older parents, while the divorce rate among older people is increasing.

And there are growing risks of older people facing social exclusion with the growth of new technology and greater reliance on the use of ICT to enable people to keep in touch, the declining value of pensions and the greater prevalence of older people not living with or close to their families.[28]

1.1.2 What learning needs arise from these trends?

Growing older and managing the four major life transitions which affect the majority of older people - from work to retirement; from independence to dependence; from having a partner to being alone; and from caring for children to caring for another older dependent person - give rise to learning needs. These include enabling people to make a useful contribution to society, to work for longer, maintain their independence, their health and well-being. Learning can ameliorate some of the down-sides of transitions that can be damaging to people's welfare and which incur costs both to the individual and society. For example, bereavement and divorce can often lead to less social interaction and poorer mental well-being as well as the need to acquire new skills for new tasks, such as cooking or money management.

Several consequences of a workforce which is on average getting older should drive up the need for learning. Generally speaking, older workers have declining productivity particularly in jobs which are physical (manual and factory based) or which require regular up-skilling. Employers faced with lower productivity need to invest in the continuous learning and development of an ageing workforce.

For older workers returning to work or having been out of employment for some time, they may well lack the skills needed in the modern workplace or for a change of career. Within the current generation of older workers across most of Europe far fewer of those aged over 50 and below retirement age have higher levels of qualifications than younger age groups. Those with lower levels of qualifications or no qualifications who are aged over 50 are also more likely to be unemployed than those with tertiary education qualifications.

Equally, governments faced with rising costs for health and social care need to enable older people to lead healthy and active lives, manage their medical conditions and to live independently for longer with the help of their families and friends. This includes learning for

healthy living as well as learning to cope with ageing, such as financial literacy to manage pensions and savings, and ICT to manage their households and social life.

As services, such as banking, move increasingly online, older people need to have the skills to use these services and stay active citizens. The risk of social exclusion associated with old age implies the need for more older people to learn about the value of volunteering that can help combat isolation. Older people can engage in learning either to acquire the skills needed for volunteering or to develop work-based skills and training in new skills for volunteering roles.

1.1.3   How much learning do older people take part in and what motivates them to learn?

Older people are less likely than younger people to participate in formal learning, particularly in the workplace, but there is a significant take up of non-formal and informal learning by older people.

According to the Labour Force Survey (LFS) across the EU27 in 2011 only 4.3% of older people (aged 55 to 64) participated in education and training in the four weeks before the survey compared to 10.2% of adults aged 25 to 54.[29] This age disparity is found across Europe and is not closing. In terms of informal learning, a 2007 survey found that 37% of those aged 55 to 64 reported to have participated in informal learning activities in the last year. This share is considerably smaller than for those aged 35-54 (46%) and those aged 25-34 (50%).[30]

In general it is evident that:

- For older people who are still in work, learning related to their job continues to be important. Older workers feel that work-related learning can improve their ability to perform in their current job and stay in a job. A survey of workers from 15 EU countries which asked whether they learned new things found that relatively more of those aged under 45 did so than those aged over 45 (with 70% compared to 62% of women and 73% compared to 67% of men);[31]

- Older people undertake learning more because it is interesting than because it will result in them receiving a qualification or promotion, as shown in the figures below;[32]

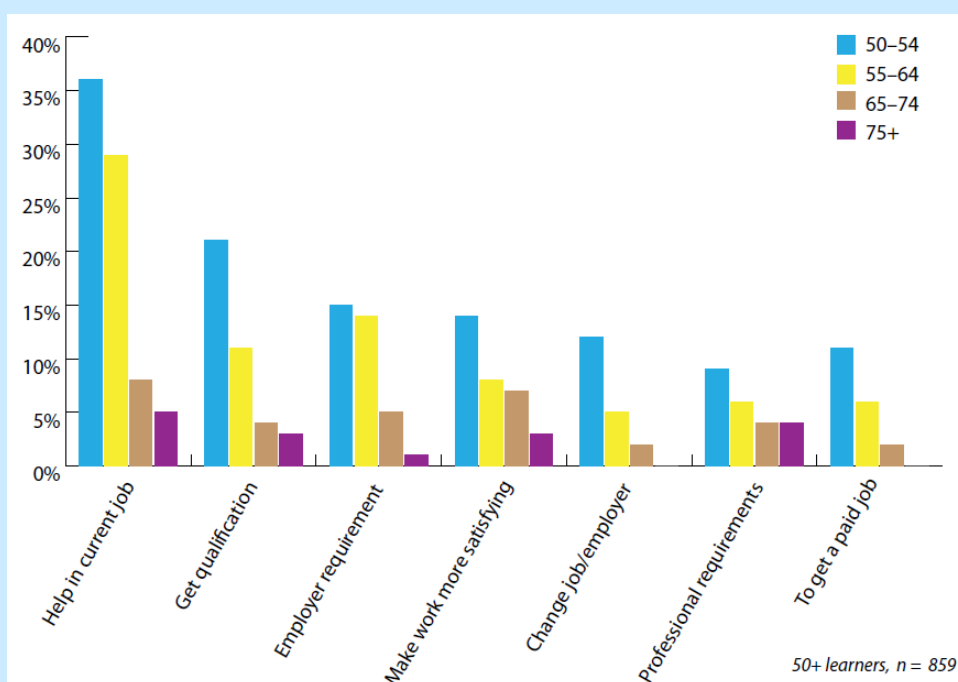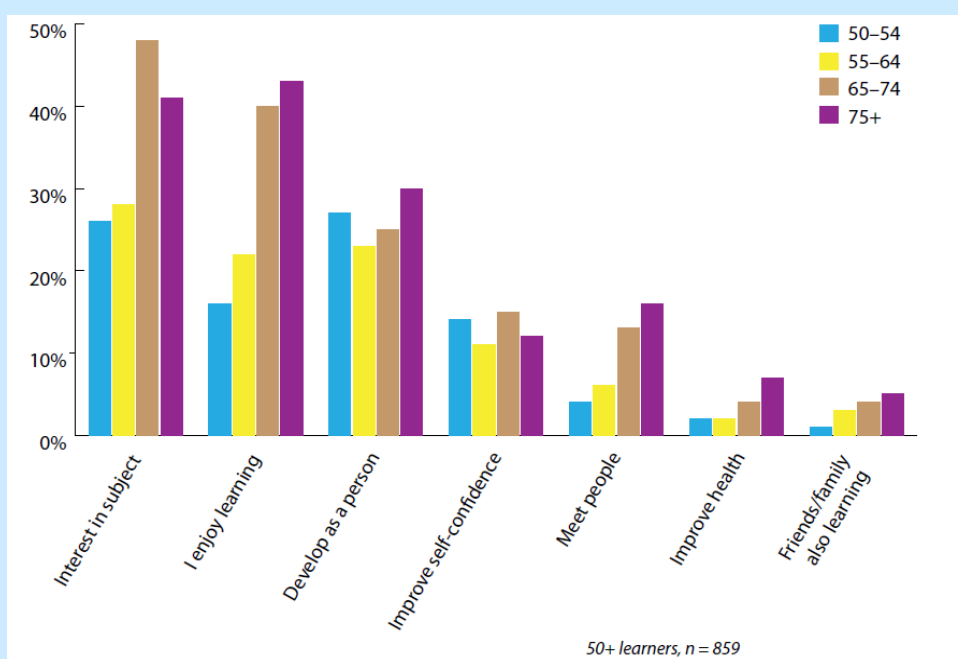**Figure 1.1 Older People's Work-Related Motivations to Learn, UK, 2012**

Legend: 50–54, 55–64, 65–74, 75+

Categories (x-axis): Help in current job, Get qualification, Employer requirement, Make work more satisfying, Change job/employer, Professional requirements, To get a paid job

50+ learners, n = 859

Figure 1.2 Older People's Non-work-related Motivations to Learn, UK, 2012

Legend: 50–54, 55–64, 65–74, 75+

Categories (x-axis): Interest in subject, I enjoy learning, Develop as a person, Improve self-confidence, Meet people, Improve health, Friends/family also learning

50+ learners, n = 859

Source: NIACE Adult Participation in Learning Survey 2012 in McNair, S. (2012), Older people's learning in 2012, A Survey, NIACE 2012

- Leisure and enjoyment is a very strong reason why older people take part in learning and training courses or undertake self-directed or informal learning. Learning is used to acquire further knowledge on a subject that they are interested in, such as a hobby, or is seen by many to be a hobby in itself; and,

- The social aspect of learning motivates older people to participate and also to continue to undertake educational activities. Making friends or seeing old friends is what drives them to join an activity and to keep returning to it.[33]

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1.1.4   What learning do they do?

Older people by and large undertake learning alongside other adults. There is also learning provision targeted specifically at older people, especially if it is health related. Most formal learning for older people appears to be work related. This is provided by employers and educational institutions and by agencies working for those who are unemployed. More non-formal and informal learning for older people is health related or providing social and personal skills. These are provided by educational institutions and a wide variety of other organisations.

In the workplace

For those in work, older people's employability is developed and sustained through training, knowledge transfer, and recognition of prior learning. In the workplace, examples of training specifically targeting older people include:

- Training to gain qualifications;

- Training to use new technologies to up-skill or re-skill; and

- ICT training courses to keep them up to date and flexible in light of the requirements of the knowledge economy.

These are expected to reverse older workers' declining productivity, provide new work opportunities in the workplace, and to act as positive incentives to stay in work.

> The **Learning Partnership E-Com+45 Grundtvig** project focused on e-competences and e-communication skills for workers over the age of 45. It improved the pedagogical approaches and content of ICT and e-work educational programmes for older people. The project lead coordinator was Aula de Mayores de la Universidad de Malaga (ES). The project partners were E-seniors Organization (FR), Federazione Nazionale dei pensionati FNP-CISL (IT), NET-MEX Innovacios es Oktat Kft (HU), Sa Noored Teaduses ja Ettevotluses (YSBF) (EE) and Intelekti Ltd (BG).

Generally speaking, larger employers invest more in formal and non-formal training for older employees because they are more likely to have age management strategies which combine general work-related training with other age-specific learning activities (such as knowledge transfer), as well as other activities, such as retirement planning.

> BMW Group's age management strategy '**Today for Tomorrow'** is designed to address many issues facing the ageing workforce. The integrated approach includes:
>
> - Qualifications – investment in training and education, including specific training for older workers, focusing on work-oriented learning and IT qualifications.
>
> - Health management - providing non-formal learning activities to promote and improve the health of their workforce such as ergonomics, exercise and diet.
>
> - Work environment - introducing productivity-improving changes such as managing health care, enhancing workers' skills and the working environment, and working time policies.
>
> - Retirement models – providing a range of retirement options with a profit-sharing scheme for future retirees.
>
> - Communications and change management - developing awareness among managerial staff of the changes taking place, including training managers about handling demographic change, monitoring the training and performance of older workers and actively encourage on and off the job training.

SMEs tend to use non-formal and informal approaches such as action learning, action reviews, coaching and mentoring and observation feedback.[34]

In education and training settings

For many older people learning takes place in classroom settings. This is often the case for employability training and for social and personal development including learning for

enjoyment. Leisure learning is provided by municipalities, voluntary and community organisations and private companies and is targeted in some countries at older people if they have not been engaged in learning.

Adult education programmes targeted at older people in many countries, such as Hong Kong and Spain, provide opportunities for older people to undertake formal learning towards academic qualifications and non-formal learning for personal development. These can be courses about digital skills, financial literacy, hobbies, crafts, languages, history and the arts, for example.

Some of this learning has to be paid for by learners themselves. In the US, the Elderhostel, also known as Road Scholar, organisation is a major provider of leisure learning providing educational travel and campus-based residential classroom courses for adults aged 55 and older.[35]

> In **Spain, University Programmes for Older People (PUMAs)** provide:[36]
>
> University Classes for Older People which are run by an association of older people. The universities provide infrastructure support, by way of classrooms or computers and may provide lecturers and tutors and advice on courses.
>
> 'Experience Universities' which have programmes developed by university staff as an extension of tertiary educational provision are already in place. These can be over several years with 180 hours of learning a year and a total of 500 hours in a complete programme.
>
> These attracted over 30,000 learners in 2011/12.

Health services are increasingly providing therapeutic education programmes for older people that are either focused on managing specific health conditions or how to cope with the common problems of managing to live with a range of conditions. Such learning is expected to pass on knowledge and skills to older people so that they can manage their health and their health conditions more effectively.

> The **Chronic Disease Self-Management Programme (CDSMP)** was developed at Stanford University in the early 1990s. It is a lay-led participant education programme which seeks to train people with a chronic condition (such as hypertension, arthritis, heart disease, stroke, lung disease and diabetes) to care for themselves more effectively. It is widely implemented in the United States and has been transferred to other countries.[37]
>
> The programme is delivered over a six week period (2.5 hour long sessions a week delivered to classes of 10 to 16 people). It is typically delivered in a local community building. The sessions are led by a peer trainer, someone of the same age group who may also have a chronic condition. It is offered in locally spoken languages, including Spanish and Chinese. Individuals are taught to control their symptoms through relaxation techniques, changes to diet, managing sleep and fatigue, using medications correctly, exercise and communication with healthcare providers.

Outside the classroom

More frequently, learning is provided which is not classroom-based, led by voluntary and community organisations in community settings, such as clubs and community centres, and is non-formal and informal. The focus is often on social and personal skills such as computing, remaining healthy and active, managing finances, learning about a new skill or sharing skills, or engaging in a discussion or talk.

> The **New Horizons for Seniors programme** in Canada aims *"to ensure that seniors are able to benefit from and contribute to the quality of life in their communities through social participation and active living"*.[38] It started in 2004; with a budget of 45m CAD (€35m) in 2011.
>
> Grants are provided to community organisations for projects which promote volunteerism among seniors and other generations and engage seniors in the community through the mentoring of others. Learning includes mentoring peers, IT skills, literacy, social media and passing on cultural skills and knowledge between generations and ethnic groups.

The **Lebensqualitat im Alter (LIMA) programme** run by the Catholic Education Institute is delivered by older people (who are trained and accredited volunteers) to people aged 55 and over throughout Austria. The courses delivered are discussion-based workshops in which learners focus on a particular issue for an hour or two each week. The topics are decided by the participants. Topics include discussion of a book that participants have read or a specific issue in the news or a topical moral question. The courses are delivered in blocks of weeks (ranging from ten weeks to a year) and are typically held in venues rented or owned by the Catholic church.

Each LIMA session is underpinned by four principles: 'thinking', 'movement', 'meaning of life' and 'everyday competences' (e.g. how computers can be used in everyday life). The sessions often cover spiritual questions such as the meaning of life, questions of belief and coping with death and illness. In some cases, these discussions involve young people and allow discussion to take place between the generations. Each session also involves some light exercises.

The programme has grown. In 2008, there were 25 sites where this initiative was delivered to a total of 380 learners. By 2011 this had increased to over 100 sites and over 1,200 learners.

A considerable amount of learning for older people outside the classroom is focused on providing a better knowledge of healthy behaviours in relation to diet, exercise, and medication which can help to prevent poor health and improve their cognitive skills. This is often provided by health services and community and voluntary groups established to provide information and advice to people with specific health conditions so it is not necessarily targeted at older people (but people with the condition such as diabetes, or a behaviour such as smoking tobacco) and it is often not continuously funded but provided through grants and project funding.

The **Seniors Show the Way project in Bradford** (UK) focused on improving the health of older people in a declining industrial area of northern England. It had three strands to improving older people's health – learning around healthy eating, improving mental well-being, and increasing physical activity. Led by a public health service team, it recruited and trained community health champions from among the older population of the area who would pass on their learning to other older people. This process recruited over 1,400 champions from all ethnic groups. Some of the champions provided more non-formal learning to older people. Over 5,000 people benefited from the sessions they ran. These included:

■ Acting as swimming buddies;

■ Running sessions in schools on cooking, eating and relaxation;

■ Leading and organising walks and bird watching sessions; and

■ Providing exercise classes.

1.1.5 What are the evidenced benefits of learning undertaken by older people?

Older people benefit from continuing to learn at work and from learning when they are retired, especially in relation to their social well-being, health and civic participation. This provides positive impacts for employers and for the state.

Employment

Learning in the workplace increases older workers' employability:

■ Older workers who have received on-the-job learning can improve their productivity. BMW's creation of factory floor work teams made up of older workers suggests that with training they can improve their productivity levels to equal those of younger workers;[39]

■ Older workers are able to update their skills to perform work tasks better. This is true particularly with gaining accreditation for existing skills and gaining competences in ICT.[40] Gaining digital competences can, in turn, lead to accessing further learning activities (such as online courses) and other jobs.[41]

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As a consequence providing learning to older people (whether in work or seeking work) results in sustaining their employability and raising productivity with benefits for employers and the economy.[42] This is recognised by older workers who have received training in addition to the attainment or updating of qualifications.

In **Finland** older workers aged 50-64 are as likely to report benefits from job-related training as younger workers. A higher proportion of those aged 50-64 reported that the training resulted in a greater probability of them keeping their job (44% aged 50-64 compared to 22% aged 25 and under) and of gaining higher pay (32% aged 50-64 compared to 15% aged 25 and under).[43]

An evaluation of a large intervention of **advice and training to older workers in the South East of England** which engaged 353 employers (92% SMEs) and 1138 employees aged between 50 and 85 found that the older learners who received training reported the following benefits:[44]

- Over 90% said that the training improved their skills;

- Over two thirds said that the training helped them do their job better;

- Half said that participating increased the likelihood of doing more learning in the future;

- A third said that participating had increased the likelihood of staying in work longer.[45]

For older people seeking work, tailored learning helps to increase their employability alongside the development of self-confidence and knowledge and understanding about career options. It can help them to search for and obtain a job. In a programme in the Czech Republic 70% of participants succeeded in getting a job.[46]

Employers benefit from retaining the skills of older workers because it helps them to reduce skills gaps and shortages. Summative research indicates that employers believe that learning for older workers brings them benefits as a result of the knowledge, competences and renewed motivation older workers have gained. This includes:

- Gaining a better skilled workforce with the flexibility to innovate and make vertical and horizontal career moves;

- Retaining skills and delaying retirement to contain skills shortages; and,

- Gaining a healthier workforce.[47]

Small and medium sized enterprises whose employees received training through a regional initiative in South East England reported the following benefits[48]:

- Increased employee motivation (67%);
- Increased productivity / performance (61%);
- Increased commitment to the firm (48%);
- Increased flexibility (45%);
- Improved industrial relations (22%);
- Helped people face retirement (18%);
- Reduced sickness (8%); and
- Helped people face redundancy (4%).

Social and personal skills

Improved personal and social competences are the most common learning outcomes for older people. While most learning is structured around acquiring a specific skill, knowledge or competency, the primary benefit reported by most older people is an improved confidence and feeling more positive about their lives through the social aspects of the learning activity. For many older people, the common learning purpose enables them to interact with other people, make friends, and create new interests. It also provides confidence to take up further learning and to recognise the knowledge and skills which they do have. [49]

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It is clear that participation enables learners to expand their friendship group, to spend more quality time with their family because they *"share their learning with their family"* (this appears to be particularly true for women), and to reduce their social isolation.[50]

A **longitudinal survey of literacy and numeracy learners in Scotland** measured differences in interpersonal behaviours during a learning course and a year afterwards. Older learners were found to be more confident in joining in a group of strangers, in speaking up in a group meeting and more confident about being interviewed since beginning the learning.[51] There was also evidence that participation resulted in extending social networks and creating 'bridging networks'. Older learners were more likely to say that they went out to pubs, clubs and/or the cinema after they had completed the course.

Older learners can improve their confidence in participating in learning and the wider community.

A structured 50 hour learning course (**Vital Aging-M**) for older people in homes and clubs in Spain found that compared to a control group of non-participating older people, those participating in the course reported higher levels of participation in cultural, intellectual and social activities than before, and more positive opinions about participating in activities.[52]

Notwithstanding these outcomes, older people do report gaining skills. This can be ICT skills which many older people identify as skills that they lack - including knowledge of and competence in digital media, such as digital photography and sharing pictures. This is found to improve their social interaction with family and friends (for example, by using email and social networking sites), maintain their independence for longer (through online shopping) and enhance their competences for participation in volunteering. Equally soft skills, such as improved communication skills, learning to learn again, and increased resilience in coping with difficult situations are commonly found.[53]

For older people who have engaged in learning about **active citizenship** and to take on active roles in civil society, it is commonly found that they increase their knowledge and understanding of the skills they have and the opportunities to participate in their communities. They also develop their personal skills and use them in their volunteering activities.

Participants in the **Grundtvig Senior Volunteering projects** gained skills for their personal development. 43% of the individual participants felt the experience had increased their technical skills in their volunteering activities while most participants felt that participation in the learning activity would help them in their current volunteering role (86%). Language skills had improved with just under half of the volunteers reporting improvements. This was supported by qualitative evidence from participants who had used learning to review and revise their own voluntary activities and to extend them. For some it had been a major fillip to their engagement in volunteering.[54]

Learning can drive up active civic participation: increasing participation in volunteering; increasing participation in community activities; and building the capacity of the community and voluntary sector (skills, leadership).[55] Equally involving older people who are volunteering in learning increases both the amount of volunteering they do and affects the roles they carry out.[56]

The **Elderly Helping the Elderly** national initiative in Denmark trained volunteers over the age of 60 (3,500 in 2006) to help other older people with a range of activities, such as shopping and IT. The learning initiative also encouraged volunteers to participate in other volunteering opportunities. An evaluation of the programme in 2005 showed that nearly three-quarters (73%) of the participants took up another voluntary commitment.[57]

By providing voluntary and community services with knowledgeable, better skilled and more motivated volunteers, learning raises the overall quality and capacity of voluntary and community services.

The **Hear Me** Grundtvig programme multilateral project recruited older people around the

age of retirement to mentor young adults at risk of not completing upper secondary education or studying qualifications needed to get a job. While many of the volunteers had work skills which they could use they benefitted from training courses to act as mentors of young people aged 11-25 with special needs. The project lead coordinator was VIA University College (DK). The project partners were Turku University of Applied Sciences (FI), Universitat de València (ES), University of East London (UK), Bonny Downs Community Association (UK), Auralan Kannatusyhdistys ry (FI), Town Council of Gandia (ES), Hogeschool Utrecht, and University of Applied Sciences (NL).

Health and well-being

There is strong evidence that targeted health education reduces the burden of chronic illness and increases the quality and years of healthy life of older people.[58] A review of 598 studies (with a total of 61,000 patients) found that 64% of the studies reported positive health effects on the learners from their participation in a therapeutic education programme.[59]

Evaluation of the **Chronic Disease Self-Management Programme** in the US shows that learners, compared to a control group, were: more confident in their abilities to control their conditions; more likely to adopt healthy behaviours (such as taking up exercise); and had improved physical health (such as improved energy and fatigue levels). A meta-analysis noted the following outcomes: improvements in self-efficacy, consistent improvements in psychological health status (for health distress and depression), a small improvement in energy and fatigue levels, some improvement in health behaviours (including cognitive symptom management, aerobic exercise, and communication with their physician).[60]

In general, learners put into practice new knowledge gained on improving diets and taking up exercise, which helps to improve their health over the longer term. It is also generally the case that simply enabling older people to undertake physical activity, even when this is mild, results in immediate positive health outcomes. For example:

■ Dance classes result in greater flexibility in tendons and joints, better cardiac functioning, muscle strength, resistance to osteoporosis and lessening of joint and muscle pain, reduction in falls[61] and improvement in balance;[62]

■ Singing and/or playing a musical instrument lead to improvements in breathing and keeping fingers supple;[63]

Participants in the **"Vital Aging-M"** course in Spain did significantly more exercise and had significantly improved their diet after the course compared to a control group.[64] A study of an earlier programme (Vivir con Vitalidad) in Spain showed that participants demonstrated significant differences in health outcomes (measured by a physician) and on functional abilities three to four years after the course compared to a control group.[65]

The benefits appear to be greater when the learners have existing health problems or disabilities.[66] Older learners with the lowest level of prior education report the highest well-being benefits from joining a university course of any type in Spain.[67]

There is a positive relationship between intellectual stimulation (from both social and solitary activities) and health outcomes such as reduced onset of dementia.[68] For example, a study of 250 older people aged 55-86 in Canada found that those engaged with social activities and activities which required processing new information were less likely to demonstrate memory loss and slow comprehension speed.[69] However it is argued that the outcomes are correlational because the older people who participate in learning are also more likely to be healthier than their peers.[70]

Learning about healthy living can be expected to reduce the strain on public resources of services to improve mental and physical health. The Chronic Disease Self Management Programme reportedly saved from $390 - $520 per patient over a two year period primarily as a result of using fewer drugs and making fewer calls on medical services.[71] Similarly in the UK, work carried out by NIACE on nursing homes the effects of learning on patient's well-being and in addition savings on medication and sanitary materials as sleeping patterns and improved and less instances of incontinence were recorded[72].

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1.2 How can learning for active ageing be enhanced?

1.2.1 Understanding how positive outcomes from learning for older people are achieved

Achieving positive outcomes has required actions and funding by governments to influence the supply of and demand for learning for older people. These actions range from: **regulations,** such as requirements for employers to train or for employees to take up learning; **financial incentives** for learning, such as grants and subsidies to employers and voluntary and community groups and loans to individuals; and **strategies and agreed action plans** between parts of the state and social partners to encourage changes to adult education systems.. Providers of learning themselves have identified that the **settings and content of learning** for older people sometimes need to be adapted to motivate older people to participate and learn effectively. **Building the capacity** of the adult learning sector is important to ensure that learning provision responds to the needs of older people.

Regulation

Older people have been provided some protection in relation to access to learning through measures against age discrimination. Regulations have been used to require employers to meet older workers' needs, including training, and to reduce barriers.

> The French **Law for the Funding of Social Security ('Loi pour le Financement de la Sécurité Sociale' – LFSS)** was enacted in May 2009. Two of its specific measures are[73]:
>
> ■ Requiring companies with at least 50 employees to reach agreements with social partners in favour of seniors' employment or, where agreement cannot be reached, to produce an action plan encouraging seniors' employment in the company; and
>
> ■ Removing the right given to an employer to force an employee to retire without consultation (protection from forced retirement).
>
> In order to ensure that all companies comply with the first measure, there is a penalty of 1% of the earnings or profits paid to employees over the period during which the company was not covered by an agreement or an action plan.[74] To date, approximately 34,200 agreements and action plans have been produced by companies or groups.[75] A sample analysis of 1,500 agreements shows that over two thirds have focused on the development of professional careers (68%) and skills and qualifications development (72%).[76]
>
> France has also legislated to require therapeutic education programmes to be provided.

In Poland the government has amended the Polish Labour Code, so that employees aged 45 or more can benefit from the services provided by jobcentres (the financing of training, examinations and educational loans) in the same way as unemployed people and that employers have exemptions of payments to the Labour Fund and Guaranteed Employees Benefits Fund for workers approaching retirement age. The Labour Code has also been amended to specify employers' minimum obligations to train older employees.[77]

Financial incentives

Financial incentives and inducements encourage employers and individuals to invest in their older workers' learning. In Germany the government has provided a subsidy for training older workers in small and medium enterprises (SMEs). In Poland, as part of the Solidarity across Generations ESF programme, actions include the provision of vocational training and lifelong learning programmes for older workers; assessments of literacy and numeracy skills; training employment advisors to assist those aged over 50; and raising awareness of the need for people aged over 50 to continue learning.

> In Germany the *Geringqualifizierter und beschäftigter älterer Arbeitnehmer in Unternehmen* (**WeGebAU** - Vocational training for low-skilled and older employees in companies) was introduced in 2006 to boost employer investment in training, including older workers at risk of losing their jobs or with low skills levels in SMEs.[78] The programme fully or partly covers the costs of a vocational training programme for eligible workers with

some eligible for a wage subsidy to encourage employers to give workers time off for training. Overall, the German Ministry of Labour considers WeGebAU to have been successful. 45,000 older workers participated in WeGebAU subsidised training between 2006 and 2011 with the numbers growing substantially year on year from 705 in 2006 to 12,551 in 2010. A survey of nearly 15,000 participating employers found that 85% of the companies which participated in the programme judged the training as having a positive effect (such as increased workforce productivity).

Incentives can also encourage voluntary organised learning. In Canada, the federal government provides grants to voluntary and community groups for non-formal and informal learning. In Hong Kong, the Elderly Commission set up the Elder Academy concept in 2007 to provide funding to schools and universities who have agreed to provide learning activities to older people. In Japan, Senior Citizen's Clubs provide multi-purpose support to the elderly in their local community.

Senior Citizens' Clubs have become well established in local communities throughout Japan (over 117,000 local clubs with over 7 million individual members in 2010) with financial support from the Japanese Ministry of Health, Labour and Welfare. As a policy they are expected to: help older people to remain healthy and active; prevent isolation and loneliness among older people; allow older people to enjoy their lives so that they can "*tangibly feel the benefit of living longer";* and strengthen networks among neighbours and within communities.

They provide learning activities on a wider range of issues associated with daily life, such as accessing and navigating the health and medical care system, understanding and getting the most out of pensions, and how to use a computer, using mixed learning methods. Alongside these, members can participate in group activities, such as singing, photography, painting, pottery, folk dancing and cooking which are primarily organised as social activities aimed at combating loneliness, but have a strong learning element.

Strategies and action plans

National government strategies engage the various strands and levels of government and social partners in voluntary agreement to work towards improving education and training for older people. While in Poland strategic actions are centred around the Solidarity across Generations programme and those aged between 50 and 64 and in France on the National Action Plan for Seniors Employment, in other countries, such as the Czech Republic, policy actions are more widely drawn around government and the older population as a whole.

The **Czech National Programme of Preparation on Ageing** for 2008-2012 has policies and actions for 12 ministries including: regional development, environment, transport, education, interior affairs, health, agriculture, industry and trade, finance, justice and culture. Key elements of the programme are actions to create an age-friendly environment and communities, improve health and health care, support carers, and increase the participation of older people in society, as well as provide learning for active ageing. One of the key actions taken during this period by the Ministry of Education was to invest in Universities of the Third Age to maintain and enhance the existing network and to develop third age centres at more universities to support learning for retired older people.

Settings and content for learning

While learning for older people is not different from other adults in many respects, effective learning for older people has some distinctive features. This is particularly important for engaging older people who have not been in education and training for some time and who may carry negative views of learning.

Three key features are:

Having the **content as a 'hook'** to encourage participation. Many ICT learning projects, for example, use other subjects to encourage learners to participate in the activities and implicitly gain ICT (and other skills) in the process, such as storytelling (telling of local

history, life stories and memories of events).

Using a **setting which is informal** to promote social interaction and collaboration. This is often where the participants are already comfortable, such as in their community, their leisure space and their work place. Easy access to help, whether in the form of an instructor or peer assistance, also promotes disadvantaged older learners' self-confidence about learning.

Using distinct **marketing strategies** to persuade them to take up learning. Promoting the leisure and social aspects of the learning experience is effective as is integrating learning opportunities into wider community projects or local initiatives. Recruiting through networks of family, friends and neighbours is another strategy. Older people who are reluctant are often inspired by their peers because they realise that 'someone like them' can learn.[79]

Moving learning pedagogies away from traditional learning methods (i.e. classroom, blackboard, reading and homework) and replacing them with interactive, social and often play or project-based learning methods is found to be effective even with in-work learning for older workers.[80] A number of Grundtvig projects use the arts and culture as the learning medium.

Primary research with 172 older learners in the US observed significant differences in the learning styles preferred as learners grew older. The research showed that more 55-65 year olds prefer learning by doing, 66-74 year olds preferred learning by feeling and watching, and more of those aged over 75 preferred learning by thinking and watching[81].

Building capacity

Increasing the ability of the adult education and training sector to respond to the needs of older learners underpins effective learning. This includes improving the skills of teachers and trainers so that they are better aware of and experienced in teaching older people and can use different methods to help older learners to gain skills as well as enabling education settings, such as schools and universities to use their facilities for learning for older people. These have significantly increased the number of older people accessing both short courses of learning and taking up tertiary level learning often alongside young people.

In Hong Kong there has been strong demand from schools and universities to establish **Elder Academies** to deliver education and training for older people with the help of community groups recruiting older people onto the learning programmes they developed. The Academies are given a nominal yearly grant of HK $200 to cover any insurance/utilities costs that they would incur for delivering learning to older people and they can charge participants whether for short or long courses for incidental expenses; recreational or academic subjects; or for joining a course provided for young people.

In its first year (2007), 78 Elder Academies were set up and the number has now grown with 118 of the 600 schools in Hong Kong and with seven universities (out of a total of eight) delivering Elder Academy programmes. It is now available in all 19 districts of Hong Kong and is now widely regarded as a universal service. This is expected to grow further as the Government has committed funding to the project to increase the number of schools and universities that are participating. To date over 50,000 older people have participated in Elder Academy courses. This accounts for around 8% of the population of older people in Hong Kong.

In addition to learning providers, other groups of professionals also need support in providing learning for older people. These include career and advice centre workers so they can respond better to the needs of unemployed older people[82]; health care workers so they can respond more effectively to the requirements of older people[83] (such as providing information about healthy living); and nursing care workers to provide opportunities for learning in care homes[84].

Training volunteer teachers, tutors and mentors ensures a wide-ranging impact where it enables older people to help other older people with learning. This has to be backed up by training and support to deliver well-tested learning programmes as the Chronic Disease Self-

Management Programme has demonstrated. Projects, such as Seniors Show the Way, show that people who may be reluctant to participate can learn from their peers.[85]

1.2.2 Addressing challenges that need to be overcome

The key challenges for learning and active ageing are increasing the take up of learning by those most in need and expanding the provision of learning targeted at older people cost effectively.

Increasing older people's demand for learning

While it is clear that the needs for learning to improve older people's work prospects, quality of life, and health and well-being will be growing in Europe, many older people do not recognise these needs and the benefits.

It continues to be the case that many older people who take up learning are already motivated learners and they are more commonly women and people with higher prior educational attainment. Older people who are employed tend to do more learning than those who are not. Migrants from ethnic minorities also tend to be under-represented.

In Universities of the Third Age (U3As) and Popular Universities in Italy it is estimated that approximately 75% of people (including learners, teachers and managers) involved are women. Two thirds of learners at Elderhostel in the US are women[86]. Studies from Malta and the UK show that U3A learners tend to be from higher socio-economic groups and better educated than those who do not attend U3A classes.[87]

Many older people do not recognise that they have learning needs because they are nearing retirement, have not been advised of the value of learning, or seen the value of learning to themselves in the past. It is clear that:

- Career and Guidance Advisors have little experience of engaging with older workers and there is little or no government sponsored advice targeted at older people who are no longer in work;

- What learning is available tends to be weighted towards predictable needs while needs arising from unpredictable events, such as redundancy, the death of a partner or an illness affecting independence are not;

- While many readily participate in learning without outside encouragement these may not necessarily be the same older people who would benefit from learning most. For example, those with poor physical health are less likely to take up therapeutic education learning than those with better health without support and encouragement by others such as health professionals (their doctor) or family or friends;

- Negative past experiences of learning are a key reason why some older people are not motivated to learn.[88] Those who have had adverse experiences at school often continue to harbour negative feelings towards learning; they also tend to lack the confidence to try to master something new because they fear failure and do not recognise the skills they do have which can be built upon.

Learning also competes with other activities which older people could spend their time and money on. Many older people have caring responsibilities (grandchildren, parents and partners) which can limit their time. For others there are many opportunities for activities, such as travel, the internet and sports. These are predicted to result in fewer people choosing to volunteer in retirement and continue to be active learners.[89] Sociological studies of the baby boom generation suggest that the next generation of older people are likely to be more individualist and consumerist than previous generations although some may have more disposable income to spend on learning.[90]

Increasing provision available to reflect the scale of older people's needs

Expanding the availability of learning for older people has faced some common barriers including government funding, understanding what can be provided cost-effectively and understanding older people's learning needs and their motivations.

Among employers, larger companies are generally more aware of age management issues and are more likely to provide training for older workers to maintain competitiveness, leadership and technological expertise, although this can also discriminate against older workers with low skills. SMEs tend to lack the time and resources to allow older workers time off for training and plan for succession unless they are actively enabled to do so. Government support to employers often recognises the needs for older workers learning but does not necessarily make targeted and appropriate provision.[91]

For educational institutions, older people are often competing over government resources for adult learning which is prioritised towards younger people entering the workforce and up-skilling younger workers, an emphasis which has grown in the economic downturn to tackle increased youth unemployment. For health services stretched budgets are prioritised on hospital services and chronic diseases over preventative measures. Learning for older people targeted at older people's needs is a lower priority and is commonly provided from project funding or special funds.

In **England** the budget for community learning is less than 10% of the funding allocated for adult learning (those aged over 19) towards prescribed qualifications. For ten years the budget has been frozen so it has decreased in value in real (non-inflation adjusted) terms. Adult and community learning providers have used the budget to provide courses specifically targeting older people which do not require participants to pay a fee (such as courses in care homes). However, providers have not been able to, as they used to, offer discounts to older people on courses which are open to all adults.

Equally providers have dropped courses which are for enjoyment to deter older people who are repeat learners. Some providers assist the voluntary and community sector to establish and run community learning which is mostly taken up by older people. These include subsidised classes as well as non-formal and informal learning organised by group or self-organised by learners. Grants are given along with subsidised access to premises and training for tutors.

There is evidence that the withdrawal of subsidies from community learning has led to older people accessing other sources of education, delivered mostly by the voluntary sector at no or low cost. Most notable among these are the Universities of the Third Age and the Workers Education Association which offer many courses for free or for low fees. The Universities of the Third Age, which are managed by volunteer-learners, report "*double digit growth*" over the last five years.

Much of the provision of learning for older people depends on the capacity of voluntary and community organisations. Voluntary and community organisations which provide learning often do so with short term funding for specific projects to engage new volunteers or to train them for specific roles. Successful learning activities provided by voluntary and community organisations have been sustained by financial support for training volunteers and educators.[92] Using well-tested teaching approaches and training materials for specific learning programmes and developing distance on-line learning is not well developed for older people compared with learning for younger people.

Although leaving work and entering retirement is a major life transition, there is little evidence that sufficient learning is provided to prepare people for this. Pre-retirement courses are provided by some employers, generally large and in the public sector. There is little evidence that learning for other transitions is generally available although projects and adult learning programmes often have learning focused on specific topics of relevance to transitions such as: financial literacy; healthy living; information and communication technology (ICT); citizenship; and caring; and moving from independent to sheltered or communal living. By far the most common are ICT and healthy living. Learning for caring is not commonly available, nor is financial literacy for older people outside pre-retirement courses.

1.2.3   Considering the following actions

Governments

- Ensure that **learning is included in national strategies and action plans on ageing**, such as progress reports on the Madrid International Plan of Action on Ageing, **and in**

the remits and responsibilities of Ministries or agencies who are responsible for implementing such plans.

- **Translate plans and strategies**, including European Social Fund Operational Programmes, which identify learning for older people as a priority **into concrete actions** which target older people and reflect their needs

- Develop and **coordinate learning strategies for older people** between different parts of government funded education and training and other services (health, employment, welfare/pensions, culture, civic society, businesses) so that learning provision is complementary.

- **Mainstream learning about healthy living** through health care, health improvement and adult learning programmes, including the training and continuing professional development of practitioners.

- Entitle older people to **advice and guidance** about learning at the point when they are considering options for retirement and pensions or prolonged employment, and raise awareness of the benefits of planning and learning for retirement.

- **Review allocation of education and training budgets for older people** and consider transfer of funding from education for younger people to older people where the relative numbers of younger adults in learning is falling.

- Provide **longer term funding to support the infrastructure for voluntary and community led learning provision** for older people because they are cost effective through tapping the potential of volunteers: volunteers can be trained to be effective tutors and motivate older people who have needs to participate in learning.

- Enable **educational institutions to release spare capacity** for learning for older people - of both physical space (classrooms) but also human resources (teachers, trainers, administrators).

- **Urge all employers to engage older workers in learning and in pre-retirement learning** and actively engage and support SMEs (particularly the smallest employers) to develop integrated and comprehensive age management policies and plans to enhance older workers' skills and their employability.

- **Raise social partner awareness of the benefits of training older workers and planning and learning** for retirement for both enterprises and individuals.

Education and Learning Providers

- Increase the availability of suitable learning offers for people 50-75 and over 75 and ensure that curricula are updated to reflect their learning needs;

- **Coordinate learning provision** on the ground and ensure that it:

  o Targets older people most in need who ought to be those with lower skills, those who need to re-skill or up-skill, and those who least participate in other learning activities;

  o Builds the capacity of voluntary and community group led learning programmes;

  o Uses proven methods which successfully engage older learners;

  o Bases their funding on an understanding of what older people need, which is not necessarily based on revealed demand and educators' perceptions; and

  o Provides places in the community for older people to access learning.

- **Develop tested approaches to teaching and training materials** for tailored training programmes to support older learners, particularly around basic skills, ICT and digital competences, and ensure they are widely applied.

- **Develop online distance learning** for older people and enable older people to access it.

- **Provide access to advice and guidance** about learning to older people taking into consideration the variety of experiences and skills older people have.

- **Set fees for learning for leisure which reflect older people's ability to pay**.

- **Be actively involved European cooperation** e.g. to exchange and share their skills and practical knowledge with other organisations.

Civil society organisations:

- **Provide learning programmes** for older people which meet their needs in community settings and continue to provide training and development for volunteers.

- **Work with governments and learning providers** to plan and provide learning activities for older people.

- **Assist in recruiting and referring older people** to learning provided by governments and learning providers, especially targeting those older people less likely to participate.

- **Train tutors/organisers who provide learning** and ensure they use tested approaches to teaching and training materials.

- **Support older people to access e-learning**.

Enterprises:

- Do more to **ensure that the learning needs of older workers are met** as part of the process of discussing careers, training and development needs and work plans.

- **Have an age management policy which provides career change options, pre-retirement training courses, access to training, and advice and guidance** on learning for all employees.

- **Work with voluntary and community organisations** in their area to include learning about active citizenship in courses aimed at employees over the age of 50.

Individuals:

- **Take up training** offered by employees, governments and social partners to meet learning needs, including for work, health, recreation, volunteering and social participation.

- **Seek guidance and training for re-skilling, up-skilling and continuing professional development** for both paid and unpaid work.

- **Expect to make a financial contribution** to the costs of learning if this is for pleasure and disposable income is available.

- **Volunteer** to provide learning and encourage others to participate in learning.

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3 Intergenerational learning

"Intergenerational learning involves people of different generations becoming engaged in learning from each other and learning together. Learning is the communication and acquisition of knowledge, skills and values".[93]

3.1 Why is intergenerational learning important?

3.1.1 Demographic, social and economic trends

Historically, intergenerational learning took place within the family; not just between parents and children but also between young people and grandparents and older relations. However, interactions between generations have become more limited because of:

■ **Changes in family structure**. The decline of the extended family means that in Europe, the share of households that include more than one generation has declined. In Scandinavian countries, Slovakia, and Germany the majority of people over 65 live alone or in a couple;[94]

■ **Greater mobility of workers and their families.** Families are more likely to move away from their 'home' communities to other places in their own country or abroad.[95] This increasingly places grandparents at greater distances from grandchildren;

■ **An increase in age segregated activities,** such as providing youth clubs and sports which exclude older people and policy interventions that only target specific age groups;[96] and

■ **The increased use of the internet and online systems for social interactions.** As a result of these, there is increasing use of social networking, e-shopping, and e-services[97] instead of more traditional face to face interactions, especially by younger people.[98]

In 1993 a special **Eurobarometer Survey on Age and Attitudes** asked 5,000 people aged 60 and over from all EU12 countries how much contact they had with young people (under the age of 25) including members of their family.[99] Around a third (36%) said that they had a lot of contact while about another third indicated that they had a little (36%). About one in five reported they had hardly any contact (19%) and one in ten that they had no contact (9%).

The **European Social Survey (2008-09)** found that 53% of all Europeans have no friends aged over 70 with the proportion rising to 80% among people aged 15 to 24.[100]

Within the workplace, policies encouraging the early retirement of employees aged over 50 and their greater propensity to be made redundant by employers has reduced opportunities for knowledge transfer to younger people entering the labour market and opened up skills gaps, although this trend of early retirement has been reversed in the EU-27.[101] At the same time, young people are increasingly finding it difficult to get a foothold in the job market due to the economic crisis and lack of work experience.

As communication and cooperation between generations has become more limited, ageist stereotypes have become more prevalent. Typically older people are believed to be in mental and physical decline and a financial and social burden. Typical representations of young people include being unruly and incompetent, or as vulnerable and in need of protection.[102] Such views can contribute to distrust between generations, a lack of intergenerational equity and a lack of social cohesion.

3.1.2 What intergenerational learning needs arise from these trends?

In this context, intergenerational learning offers a means for skills, values and knowledge to be passed between generations, as well as an opportunity to foster mutual understanding to support wider objectives of community cohesion. For example, it can be a means to address challenges in civil society, such as developing a better understanding between generations, reducing discrimination and increasing social inclusion.

While intergenerational learning in the workplace has been an established way of providing training and development particularly for younger workers, it can also support young people who are struggling to begin their careers to gain knowledge and competence and provide skills which older people lack but new entrants have which can help to keep them in work.

Conversely it can be used to meet older people's needs to keep in touch with constant changes such as those affecting technology and having a better understanding of and increased interaction with children and young people.

3.1.3 What motivates older people to participate in intergenerational learning?

Despite the reduced social interaction between generations, there is an appetite for increased opportunities to mix with the other generation.

A **2009 flash Eurobarometer** survey asked 27,000 people aged 15 and over from all EU27 countries whether they agree with the statement that "there are not enough opportunities for older and younger people to meet and work together in associations and local community initiatives". Almost two thirds (64%) agreed with the statement. Only around a quarter (27%) of respondents believed the government is doing a good job of promoting a better understanding between the young and old[103].

Older people are strongly motivated to participate in intergenerational learning for altruistic reasons: to pass on their skills and knowledge to the younger generation. Researchers have developed the concept of "*generativity*" to help explain this, which can be broadly defined as *"the concern in establishing and guiding the next generation"*[104]. Typically, people develop generativity in their midlife (late adulthood). When they are settled in their careers they tend to identify a desire to participate in activities that give them a sense of purpose and progression in their lives. Older jobseekers, for example, have reported that they see work as an opportunity to teach, train and share skills with younger generations.[105]

Younger people equally appreciate the opportunity to share knowledge and to *'make a difference'* to the lives of other people and contribute to their local community. Through more formal activity, often leading to an award or other form of recognition, young people can be keen to demonstrate new skills and build confidence, with a view to meeting the needs of prospective employers or make applications to colleges and universities.

For educators, older volunteers are a useful extra resource, often focussed on helping children improve their literacy, numeracy and social skills in a friendly and supportive environment. They can bring additional skills and enthusiasm to assist a teacher in the delivery of their work and in recreational activities. In the workplace they can provide on the job training to reduce the need for formal training, particularly while mentoring apprentices and supervising their practical training they can pass on their know-how and expertise.

1.2.4 What intergenerational learning do older people take part in?

Intergenerational learning is largely non-formal and informal. It takes place in the workplace, in educational settings and in a range of settings outside the classroom, such as community centres and public spaces.

In the workplace

Workplace intergenerational learning can be **informal** such as the transfer of knowledge on job tasks between older and newer younger workers; this is commonplace and well-established in many businesses. It also occurs where the know-how and experience of employees retiring is passed on which is particularly important in small businesses and where older workers' skills are in short supply.[106]

Transfert de Competences Acquises et de Savoirs Techniques (**TCAST**) was a project which took place between 2007 and 2009 within the framework of the Grundtvig programme. It ensured that older skilled artisans, who were retired or about to retire, had an opportunity to transfer their skills and technical know-how to younger generations to guarantee the future of these trades and the future of the built heritage in their

communities. The project lead coordinator was the Office de l'Environnement de la Corse (FR). The project partners were Consell de Mallorca (ES), Comunita Montana Suol d'Aleramo (IT), KEK Techniki Ekpedeftiki (EL)

Intergenerational learning can also be **formal** through arrangements for apprenticeship schemes and mentoring and through the creation of multi-generational teams.[107] Apprenticeships commonly provide one-to-one training, potentially over a long period of time and contribute to a young person achieving their qualification. Mentoring also occurs where an older employee is matched to a younger employee going beyond induction to the culture of the organisation ('learning the ropes' or 'this is how *we* do things here') to gaining knowledge and skills. [108]

In education and training settings

Intergenerational learning in educational and training settings is relatively widespread in Europe and internationally. Nonetheless, it is not commonly mainstreamed in educational institutions' educational work. It often involves volunteers and uses mentoring as the means to share skills, knowledge and experience by both the younger people and older people who participate.[109] This complements traditional classroom based learning.

Germany is a notable example of a country that has promoted intergenerational learning since the 1980s and has built it into the work of educational and training settings after piloting.[110] The **Experience Initiative (Erfahrungswissen für Initiativen - EFI)** programme was introduced in 2002 to promote active citizenship through volunteering in education settings. It funded and trained 1,000 'senior trainers' (seniorTrainerIn) to establish or build on existing educational initiatives, such as after school clubs, cultural activities and language lessons, in their own communities. Since 2006, the initiative has been mainstreamed with local or regional offices run by volunteers and supported by Länder or municipalities.[111]

Intergenerational learning can be found in a wide variety of settings, including schools, universities and colleges and occasionally in day childcare and pre-school. Examples include:

- **Higher education**: Some universities have developed intergenerational learning as part of their learning offer to adults. Dublin City University has developed a Saturday programme of intergenerational learning focused on ICT and creative writing for older people with small subsidies from the government to reduce fees. Students are paired with older people who act as helpers/tutors to them.

- **Further and vocational education**: Intergenerational learning is used to enhance the professional training of apprentices and trainees, often assisting entry to nursing, other caring and social work professions. It is a feature in the vocational and educational training curriculum of a few countries.

- **Schools**: Intergenerational learning is frequently in place where the curriculum requires young people to be active citizens. For example, schools which follow the International Baccalaureate (IB) curriculum, service to the elderly forms part of the compulsory Community, Action and Service component.[112] It also takes place were schools bring in volunteers to supplement teaching and parental support.

- **Pre-school**: One Generation Daycare centres in the US provide care to pre-school children and elderly adults with dementia and other care needs.[113] Older people are encouraged to assist in learning activities that young children enjoy such as crafts, bread making and music.[114]

The **Lire et Faire Lire** programme in France started in 1999 drawing on an activity that had taken place in Brest since 1985 to provide opportunities for older people to read to young children and inspire them to read themselves. The programme has expanded across France and is successfully helping children improve their literacy skills and their interest in reading. Nonetheless, accommodating volunteers in schools can often be challenging. Older volunteers are frequently deterred by the very strict timeframes which

do not always suit them and some schools often place strict requirements around the reading material which can be used to fit with curriculum requirements.

Outside the classroom

Intergenerational learning outside the classroom is relatively widespread across Europe and tends to be informal and non-formal. Typically, it aims to bring older and younger people together to take part in cooperative community-based activities. Often it takes place on sites that younger and older people go to as part of their usual activities so it can be the location of a volunteering activity or club for sports and hobbies, a place of worship, a public facility such as a museum, gallery or theatre or a community centre.

Different types of non-classroom based intergenerational learning activities include:

■ **Bringing older and younger people together to work towards common goals and shared solutions to community problems** such as restoring redundant and derelict industrial sites and buildings, the improvement and management of public spaces such as squares, parks and gardens, and better use of cultural spaces, such as museums to ensure that these assets and spaces are used effectively. The activities may facilitate discussion between older and younger people about what action should be taken – for example, forums to share points of views about different potential uses of public spaces – or might be more practical –for example, clearing wasteland and turning it into a community garden. As well as developing solutions to local problems, these types of activities are intended to promote increased understanding between generations.

In Japan, groups of older and younger people come together to undertake outdoor activities, such as gardening and the cultivation of food and flowers, in the community; and environmental improvements such as cleaning parks, rivers and other public facilities.[115]

In Finland, World Wildlife Fund Workcamps bring together volunteers of all ages in a nine-day residential camp programme. The aim of these volunteer camps is to preserve the natural habitat and the diversity of flora and fauna. Participants are taught how to manage and conserve traditional habitats and learn about threatened species and then undertake jobs such as mowing, raking, clearing root stocks and building duck boards, fences and shingle roofs.

■ **Enabling older or younger people to share their skills and knowledge with the other generation.** In these activities, there is generally non-formal learning to pass on and learn new skills from enthusiastic role models. For older people these often include craft skills; for young people they often include ICT knowledge and skills.

The **Stimulating ICT Learning for actiVE EU eldeRs (SILVER)** Grundtvig project involved school students teaching older people how to use ICT. This provided older people with the competences and resources to benefit from ICT. School students gained communication skills, as well as lessons in social responsibility and intergenerational understanding. [116] The project lead coordinator was Fondazione Mondo Digitale (IT). The project partners were Societatea Romana Pentru Educatie Permanenta (RO), Centro De Educacion Permanente Siete Villas (ES), European Federation of Pensioners and Elderly People (BE), Perspectives Asbl (BE) and the University of Edinburgh (UK).

The **Seniors in Action** Grundtvig project trained older people with special skills (such as honey producers, organic farmers, horseshoe casters, mathematicians, poets, chess players, and painters) to become better equipped and more active as informal educators of school pupils. They then went into schools to support teaching and learning. [117] The project lead coordinator was the European Cultural Organisation-Social Education (EL). The project partners were the Znanie Association (BG), Los Palacios y Villafranca Town Hall (ES), Association Peuple et Culture Finistère (FR), Rezekne District Council (LV), Romanian Association for Counselling and Support (RO), Maribor Adult Education Centre (SI), Pixel Associazione (IT) and the Community Enterprise of Culture, Tourism, Sports and Social Solidarity of the Municipality of Elassona (DEPTAKAL) (EL).

- **Creating multi-generational public housing and communities so that older people can support disadvantaged young people.** Often this type of community initiative focuses on providing disadvantaged young people with opportunities to interact with older people as positive role models and mentors. Younger people are expected to benefit from a stable, supportive community environment and older people are able to gain satisfaction from contributing to their local communities

The **Treehouse Community** in Massachusetts is a purpose-built site of 60 mixed-income rental homes - 12 for foster families and 48 for seniors - and a community centre. The seniors are expected to provide vulnerable foster children with a steady, supportive and predictable environment in which they can grow and learn to function in 'normal' surroundings. 'It takes a village to raise a child' is the community motto. It also gives the older people an opportunity for an active and social life while at the same time making a difference in the lives of foster children.

- **Facilitating mutual exchange of experiences and knowledge by bringing generations together in shared community spaces.** These spaces may be physical, such as community centres and libraries, or virtual, such as websites or online forums. Activities are designed to allow each generation to contribute their specific skills, knowledge and understanding for the benefit of the other generation so there is mutual gain and interest.

In the **European Memories** Grundtvig project young people were enabled to assist older people to post stories of their lives on a website which could be used for school history lessons. It took place in locations where both older people as well as younger people went. The project lead coordinator was UNIEDA (IT). The project partners were Associaçao Valorizaçao Intergeracional E Desenvolvimento Activo (PT), Danmarks Paedagogisk Universitetsskole, Aarhus Universitet (DK), Social.Label E.V (DE), Evropeyski Informacionen Centar - Veliko Turnovo (BG), Fundació Privada Desenvolupament Comunitari (ES) and Fondazione Archivio Diaristico Nazionale-Onlus (IT).

3.1.4 What are the evidenced benefits of intergenerational learning?

Intergenerational learning makes a significant contribution to older people's learning needs at work and for maintaining their health and independence. Older people in turn make a significant contribution to young people's general education and their acquisition of skills for active civic engagement and employability.

Work related

For older people, intergenerational learning in the workplace has provided increased motivation for staying in a job, taking up training and obtaining new skills. One result of BMW's Today for Tomorrow programme is that workers over the age of 50 are now just as likely as those under the age of 50 to take up training. Younger workers also provide older workers with knowledge from their general education and off the job training, such as the use of ICT or new equipment and techniques. For young people the benefits are learning skills on-the-job and gaining a greater commitment to their work.

A comparative study of **high-technology companies in Quebec and Germany** found that the intergenerational knowledge-transfer culture in Germany led to trainees feeling a stronger attachment to their department and firm. This led to trainees staying with their companies longer than in Quebec where there was greater trainee (and staff) turnover.[118]

The **Good Working Life** project in Denmark included mentoring which enabled young teachers to learn from older teachers' experience of classroom management and tackling family problems while older teachers learnt about new subject material and teaching aids. This contributed to discouraging early retirement and increasing older teachers' satisfaction with their jobs.

Employees in **IT teams at BMW Group** were divided into mixed age groups (with a maximum of 10 workers). The groups defined their own learning objectives alongside various company-defined objectives. The older staff passed on their content and company

knowledge to the younger staff while they in turn instructed their more experienced colleagues in technological and methodological know-how regarding IT and communication systems. Knowledge transfer took place informally and in meetings and workshops developed especially to enable this and to ensure all the staff gained a specific IT qualification.[119]

Employers value the introduction of intergenerational learning and report benefits such as speedier induction, better retention and higher performance of both older and new employees.

The **Senior Intergenerational Social Capital (SISC)** Grundtvig project found from a study of 60 employers that effective mentoring of young people achieved the following: improvements in overall knowledge and information flow in the organisation; quicker induction of new employees; improved retention of new employees; and better quality work overall. The project was led by Ente per la Ricerca e la Formazione (IT) and the project partners were RKW Hessen (DE), the Institute for Public Enterprise and Democracy (PL) and iCentres (BG).

In Denmark, giving older teachers mentoring roles in the **Good Working Life** initiative was one of the factors that reduced early retirement with a doubling of the number of teachers aged over 60 in the workforce in the six years since the activity started in Horsens, as well as a reduction in sickness absence.

It can also provide employers with an increased capacity to innovate from the improvements in communications and knowledge exchange.[120] [121]

In the **UK, Domestic and General**, a provider of insurance policies and warranties, found that by recruiting workers for their call centre from a mix of ages and training workers together resulted in fewer new staff leaving the company. Older and younger trainees learned from each other: exchanging IT skills, handling problem callers, and communication skills.[122]

Social cohesion

Intergenerational learning achieves greater understanding of the other generations. A reduction of negative stereotypes is generally achieved. Both older and young generations report that the learning activities help them to understand each others' lives and they have a more positive perception of each other.

In the **Nature for Care** Grundtvig project young children's opinions about older people changed positively while most of the older people enjoyed the experience and had equally changed their opinions about young children. After the activities more children agreed that older people and young people have a lot in common and that they can learn from older people. The proportion of older people who reported that they enjoy being around children almost doubled after taking part in the project activity while the proportion who said that they understand better how young people think increased from 83% before to 100% after the project. The project lead coordinator was Stichting Veldwerk Nederland (NL). The project partners were Sense & Sustainability Training (UK), Magosfa Környezeti Nevelési és Ökoturisztikai Alapítvány (HU), Chaloupky o.p.s., skolska zarizeni pro zajmove a dalsi vzdelav (CZ), Borrowed Nature Association (BG) and Regionaal Landschap Vlaamse Ardennen vzw (BE).

It is generally the case that as a result of better mutual understanding, participants are less afraid of and intimidated by the other generation. They feel greater empathy towards each other and a greater willingness to interact and form social relationships.

Children aged between 6 and 8 years old who had participated in intergenerational learning at **kindergarten in the US** were found to have greater empathy towards older people compared to children of the same age with no intergenerational learning experience.[123]

In Sweden **Class Granddads**, a national organisation, has over 1,000 older men providing a helping hand in schools. Granddads are an extra resource in and outside the classroom, making it possible for teachers to concentrate on teaching and learning processes. They tend to be unemployed men above the age of 50, who struggle to find jobs and have relatively low skill levels. Children appreciate the comfort and help they can bring, helping them to stay out of trouble, setting limits and reinforcing rules so no one is bullied. For the granddads, the project provides an attractive alternative to unemployment, increasing their self-esteem and helping them to gain new skills towards a job. [124]

Participants also tend to gain a greater sense of social responsibility and citizenship. Older people taking part in intergenerational activities often increase their participation in other voluntary and community activities while young people see the benefits they can bring to older people which they had not previously been aware of. Older people participating in intergenerational learning activities in Hong Kong not only developed more positive views about their community but became more willing to participate in volunteering. [125]

The evaluation of the projects of the **Generations Together** programme in England found that 89% of young people and 72% of older people participating agreed or strongly agreed that they were more involved in positive activities; 95% of young people and 82% of older people agreed that they would be more likely to volunteer in the future as a result of involvement in Generations Together.

Increased participation in mixed-age community-based activities and better understanding suggests greater interaction with different social groups, which should contribute to increased community cohesion more generally. For all groups intergenerational learning helps bridge the "generation gap". Learning centred on the arts and cultural interests often provide a common thread for both young and old.

Personal development

For younger people intergenerational learning generally provides improvements in confidence, skills and, over time, educational attainment and employability. This includes:

- **Improving literacy and reading skills** through receiving regular support from older volunteers (such as the Reading Friends scheme in Denmark and the Born to Read (Nati per Leggere) project in Italy). [126] Qualitative evidence points to an improvement in reading attainment which also assists their confidence when presenting ideas to peers and adults/teachers. Storytelling by older volunteers helps to inspire children to read. [127]

- **Improving knowledge and attainment**, such as gaining knowledge about science and developing a better understanding of history after speaking and hearing from older people's first-hand experiences of life. Quantitative evidence from an evaluation of a mentoring programme in the US, which matched low-achieving secondary school students with older adults, showed that 80-90% of participating students improved their academic results as a result of their involvement (compared to 50% which is the usual expected improvement for such schemes). [128]

- **Improving behaviour and attendance:** Younger people improve their behaviour when mentored by older people, who are considered a 'wise head' and independent of family and teachers. [129] Studies from the US highlight how the involvement of older people, acting as volunteer assistants in classes and playground supervisors, can lead to improvements in behaviour in the classroom and the playground and improvements in attendance and reductions in exclusions from school. [130] Children who participate in intergenerational learning tend to self-regulate their behaviours better and have more positive attitudes to life than children who did not participate. [131]

For the older people intergenerational learning generally **improves their skills for independent living and their active citizenship roles.** Older people who have mentored or taught young people have gained skills which they deploy through other volunteering opportunities. In return older people have often acquired ICT skills which help them to manage their lives more independently. [132]

> **Dublin City University's** short courses for senior citizens on topics such as ICT, writing, and physical and psychological well-being are supported by teachers and students from the university. For the older people, participation in the courses has helped them to develop ICT skills that allow them to communicate with family and friends and share common interests. For students, positive outcomes were generally perceived to be learning from the experiences of the older people and building their own capacity to communicate.

Health and well-being

Outdoor community-based activities, such as community gardening or clearing derelict sites, encourage both generations to engage in physical activities which result in immediate health benefits. There are mutual benefits too in intergenerational learning focused on healthy living, such as healthy kitchen projects where older and younger people cook together, share recipes and develop knowledge of healthy eating and nutrition.

For younger people intergenerational learning increases their knowledge of healthy behaviours and improved care skills.

> The mentoring programme **'Across Ages'** in the US matched older people with secondary school students. It found that participating students demonstrated improved awareness of being healthy and safe as well as greater knowledge about drug and alcohol abuse.[133]
>
> Older people acting as mentors to parents of children with disabilities or who face challenges, such as teenage mothers, raising children with HIV/AIDS, being foster carers have improved parents' caring skills. Participating families in the **Family Friends** project in the US had fewer contacts with doctors and children experienced fewer days in hospital than before the programme.[134]

Older people tend to improve their health from participating in intergenerational learning and appear to see improvements to their mental health and well-being.

> Several US studies show that **intergenerational learning improves older people's health**:
>
> - Older people, aged 60 to 86, who volunteered for intergenerational learning activities in schools burned 20% more calories a week, experienced fewer falls, were less reliant on walking sticks and performed better than peers on a memory test.[135]
>
> - Older people with mild or moderate dementia benefited from volunteering with children aged 5 to 14 over a five month period than a control group[136]. They found that those who volunteered demonstrated a significant decrease in levels of stress compared to those who did not;
>
> - Older people with dementia were found to become more responsive and animated in interactions with children.[137] Older people aged 75 to 98 who were diagnosed with probable Alzheimer's in a controlled study were more likely to be engaged when an intergenerational activity was offered, compared to a non-intergenerational activity or no activity at all.[138].

There is less agreement over whether intergenerational physical activity programmes are more effective than those aimed at older people only. Participants in physical exercise intergenerational learning programmes have been found to achieve greater improvements in physical condition measures, such as muscular strength, compared to participants in a control group with no intergenerational element although this is not supported by all such studies.[139] Furthermore, such programmes underline the importance of exercise and diet for people of all ages and contribute to combatting the problem of obesity common in today's society.

3.2 How can intergenerational learning be enhanced?

3.2.1 Understanding how positive outcomes from intergenerational learning are achieved

Intergenerational learning achieves benefits for both generations through engaging learners, the approaches to learning adopted, and building the capacity of providers.

Understanding the needs and motivations of older people in intergenerational learning

Successful intergenerational learning creates a learning offer for older people based on the expectation that older people can be motivated to share their knowledge, skills and competences with younger people. Older participants' desire to pass on skills and knowledge to the next generation is key to driving participation along with the more usual motivations of wishing to learn a new skill and appealing to older people's broader motivations for volunteering, such as wanting to help others in their society.

> The **Unused Potentials of Senior Migrants (UPS) Experts for Life** Grundtvig project engaged older migrants and trained them to become 'experts for life'. These experts then helped other migrants, of all generations with the problems and issues they encounter in all aspects of life, such as dealing with local authorities, finding employment, integration in society and reaching out to local migrant self-help organisations.[140] The project lead coordinator was the Institut für Migrations- und Aussiedlerfragen HVHS St. Hedwigs (DE). The project partners were Aristotle University of Thessaloniki (EL), Centro per lo Sviluppo Creative "Danilo Dolci" (IT), Social innovations Centre (LT) and Inkerin kulttuuriseura (FI).

Approaches to learning

Successful approaches to teaching and learning in intergenerational learning consider content, pedagogy and setting.

The **content** must appeal to both older and younger participants so it has to be relevant to their needs.[141] ICT successfully brings together young people and older people and can be focused on skills relevant to older people's daily lives, such as for home shopping and using digital cameras. Equally, the inherent experiences and skills that older people have can be used to guide young people in their reading, their studies and in achieving their aspirations for work and further education.

Intergenerational learning works best with **alternative learning activities,** not traditional classroom or group-based teaching. Many intergenerational learning activities are built around a specific project, such as collecting knowledge about local buildings or family history. This can lead to the development of associated skills (ICT, creative writing, video production, presentation skills, mentoring skills).

The **learning environment** is important for the success of intergenerational learning. For place-based activities, the local community is the key ingredient in bringing the participants together. For others, holding learning activities in places familiar to one of the parties (such as the local school or community centre) ensures that at least one of the groups is familiar and comfortable with the surroundings while exposing the other to understanding the other generation's daily life. Ideally, the venue should be most familiar to the group most reluctant or difficult to engage (such as disadvantaged children); although this is not always the case with learning taking place in new and challenging environments having good results.[142]

Building capacity

Improving the capacity of teachers and trainers to provide intergenerational learning increases the quality and quantity of intergenerational learning provision. The capacity building should include providing training materials for both younger and older people to act as voluntary tutors, trainers or mentors as well as producing and testing specific teaching materials for intergenerational learning courses.

> The **Grandparents and Grandchildren (G and G) Enhancement** Grundtvig project in Italy tested methods for increasing older people's ICT skills in other countries and

3.2.2 Addressing challenges that need to be overcome

The key challenge for intergenerational learning is that it is mostly provided through short-term grant or project funding. It is seldom part of the offer of adult learning to older or younger people except in work places where it is embedded in apprenticeship and new entrant training. A lack of longer term investment makes it difficult to sustain intergenerational learning activities, develop and learn from them, and offer them to more people. Equally for many learning from employers to schools, libraries and community centres, intergenerational learning is not necessarily seen as a means for achieving their learning objectives.

The supply of intergenerational learning is also affected by:

- **Ensuring activities are appropriate and interesting for all.** Finding mutual points of interest on which to base intergenerational learning is difficult. Without the win-win for both generations, the activity is likely to fail to achieve positive social and personal development outcomes.

- **Logistical challenges.** Finding suitable settings, fitting in with organisations' other priorities and identifying suitable times for intergenerational learning can constrain the availability of intergenerational learning. Educational institutions generally have to prioritise a core curriculum and often have little discretion around the teaching they offer. For example, organisers of intergenerational learning in care homes have to consider existing staff's workloads and work priorities. Younger people may prefer activities after school while older people may prefer activities during the day.

Although there is an appetite for increased interaction with other generations, take up can be held back by:

- Older people's lack of confidence in learning with young people or doubts they have about the skills they can contribute. This can result in an over-representation of young people and it can result in older people participating who have less to gain from the experience;

- Younger people's motivation can be reduced by the time they have to spend on learning to pass examinations and whether they are encouraged and given recognition for participating in voluntary activities, such as an intergenerational learning activity where they are providing some of the tuition;

- The persistence of negative perceptions among potential participants; and,

- Requirements for criminal records checks, including multiple checks across organisations, and the resulting administrative burden and costs which occurs in some countries for all adults working closely with young people.[144]

And the quality can be affected by:

- **Ensuring skilled facilitators and staff can support intergenerational learning, especially community-focussed initiatives.** While intergenerational learning can be delivered and supported by volunteers, skilled trainers are needed to develop and guide activities, particularly with regard to overcoming negative stereotypes and achieving consensus in addressing community problems to develop shared solutions.

- **Having activities which are not long enough to have an impact**. Outcomes related to increased understanding, trust, empathy and willingness to interact take time to achieve. Activities need to be designed to allow a rapport to develop between generations over a relatively extended period of time.

A review of **intergenerational mentoring** identifies length and frequency of contact as a key variable in achieving successful impacts. They found that mentoring requires repeated contact over a significant time period in order for older people and young people to get to know each other and develop a common understanding and sense of trust. In the Abuelas Y Jovenes programme targeting Spanish-speaking disadvantaged young people in the US its aims were not met because there were too few mentors for too many teenagers with a limited amount of contact. Intergenerational learning was most successful when the older mentor could devote at least 2-3 hours a week to the activity and when the length of programme lasted at least six months (although those lasting 12 months or more were even more successful).[145]

3.2.3   Considering the following actions

Governments:

- **Provide a strategic vision** for intergenerational learning activities nationally, regionally and locally
- **Have a champion for intergenerational activities** who drives practice forward and makes stakeholders aware of the benefits to society as a whole in relation to community cohesion, lifelong learning and healthy living as well as the benefits of the learning outcomes for both older and younger people.
- Review how **funding for education and training** can be beneficially used for intergenerational learning to achieve desired learning outcomes, for instance by **allocating public resources to voluntary led programmes**
- **Sustain investment in civil society organisations** which recruit, train, allocate and support volunteers who provide intergenerational learning in educational as well as community settings and **support existing community and interest groups** to integrate intergenerational learning into their work with particular disadvantaged groups.
- **Motivate educational institutions** to use intergenerational learning by:
  o Mainstreaming active citizenship into the general education curriculum from early years to tertiary levels to include volunteering and knowledge and support of local civil society organisations, such as local community groups for older people;

  o Recognising younger people's efforts with awards which are taken into account by employers and higher education providers;

  o Requiring vocational training to include work experience with older people where they are one of the target groups of beneficiaries.

- **Fill gaps in the research evidence** of the impact of intergenerational learning activities particularly their value in reducing anti-social behaviour and community cohesion.

Learning Providers:

- Understand where intergenerational learning can make the biggest difference and, where appropriate, **provide opportunities for older and younger people to participate**.
- Coordinate intergenerational learning provision on the ground and ensure that it:
  o Targets older and younger people most in need;

  o Builds the capacity of voluntary and community group led learning programmes;

  o Uses proven methods which successfully engage older learners.

- **Enable older people to volunteer in educational settings** such as supporting the school curriculum, vocational training, the transition to higher education and employment, and parenting.

- **Embed intergenerational activities in the educational work** of libraries, museums, theatres etc and community centres.

- Involve individual teachers, teachers' unions, local government, school principals and employment services in the process of developing intergenerational learning programmes.

This ensures an **on-going dialogue and mutual understanding** of the underlying purposes and value-added of the initiative.

- **Use innovative teaching aids and techniques** to ensure both younger and older people gain knowledge and competences in the process.

- **Provide accredited training for intergenerational learning tutors and facilitators**, including for staff in community and voluntary organisations.

- **Be actively involved European** cooperation e.g. to exchange and share their skills and practical knowledge with other organisations.

Civil society organisations:

- **Provide and facilitate intergenerational learning** in educational and community settings by recruiting, training, allocating and supporting volunteers.

- **Incorporate intergenerational learning in their activities** to increase the participation of both younger and older people in volunteering and civic participation.

- Provide **opportunities for young people to learn about active citizenship**.

Enterprises:

- **Use intergenerational learning for vocational work-based training** of new entrants.

- **Use intergenerational learning as part of age management** strategies to retain and develop the skills of older workers and to enable effective succession, especially in SMEs.

- **Increase mentoring opportunities** for older workers and use mixed age teams for continuing professional development.

Individuals:

- **Participate in intergenerational learning** both in and out of work.

- Be prepared to participate in intergenerational learning during a **longer period of time** to experience the real benefits.

- **Undertake training** to participate, volunteer and to facilitate intergenerational learning.

- **Encourage other people** to volunteer and participate in intergenerational learning.

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