

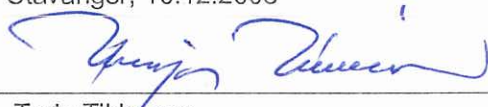
Tarja Tikkanen

**Promoting learning among older  
adults: Focus on training of the  
trainers**

Report IRIS - 2008/297

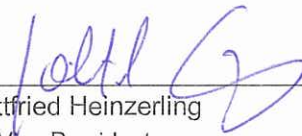
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## Preface

This report is written as a part of the project *Training Older Persons: Pioneer model usable for older adult trainers (TOP+)* financed by the Leonardo da Vinci Programme's Multilateral projects and Networks under the European Commissions Lifelong Learning Programme (133979-LLP-2007). International Research Institute of Stavanger AS (IRIS) is a partner in the project and been responsible for the starting phase of the project. The purpose has been to present the state-of-the-art regarding lifelong learning of and for older workers, with a special focus on the perspective of trainers and training providers, as well as current practice, if any.

There are many trends in the society which makes the TOP+ project highly topical. Most important of these are the demographic development, the societal transformation towards increasingly knowledge-based society, and the vastly changed nature of work since the days the today's "older workers" (here defined as those aged 45+) finished their training – if any. Furthermore, these developments are challenging the vocational and professional training, their approach to knowledge, as well as their contents and methods. The challenge comes also from the fact that the lifelong learning becoming a reality is changing their student base – a fact hardly addressed so far.

The presentation is mainly based on an extensive literature review. Additionally, a small-scale survey has been carried out among the TOP+ partners. The assumption here was that there might be activity in this area, which was not documented and/or not available in the English language. The online survey was extended beyond the TOP+ partnership, but the results reported here only cover the responses from the partners (Belgium, Cyprus, Germany, Greece, Norway, Poland, Portugal, Romania, and Sweden).

I wish to thank all the partners who made the effort to provide a systematic overview of the situation in their country from this area where there still today, as a rule, is little systematic to be found. We are also very grateful for the interest in and support to the TOP+ project from the European Commission.

The literature review and the survey have been carried out in IRIS. The presentation of the views and ideas in this report is the responsibility of the undersigned.

Stavanger 10.12.2008

Tarja Tikkanen

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# Promoting learning among older adults: Focus on training of the trainers

## Summary

Main findings from the literature review:

- Very little specific literature available on the pedagogical (or andragogical or gerogogical) aspects on learning and training of older workers. Research shows that healthy adults do continue to learn like younger adults but there are changes in how learning takes place (e.g. the pace of learning, different requirements to the learning environment, which should support concentration and be optimal in terms of audio-visual aspects).
- The knowledge-base for training providers for how to facilitate learning specifically among older workers is limited. Some organised learning and training for older workers do exist, but these experiences are rarely documented, and therefore hard to learn from. However, the availability of such examples varies greatly between the European countries. Some older literature (from the 1990s) is available from the USA.
- However, it is not necessarily clear ‘which activities and learning experiences are considered to constitute “training”’ (Pearson, 1996). In particular the on-the-job-learning – preferred by adults in general – poses a challenge from the perspective of developing learning interventions (training). It may be difficult to identify, cost or evaluate (Rix, 1993).
- Providing learning opportunities for older workers is not as such enough to motivate them to participate in organised learning activities. Older learners are one of the hard-to-reach groups, due to reasons related both to their early and often scarce educational experiences as well as to the often too elitist system of adult education (an the resulting accumulation effect – i.e. training provided to the already ‘haves’ by trainers with relatively high education themselves).
- There is an abundance of literature from related topics of lifelong learning and adult education in general, older workers (workforce demographic development), and workplace learning (human resources development).

Conclusions

- Older learners in the context of their work, is a group largely neglected by professionals in adult education (and training providers) –as by researchers.
- A good deal of general adult education models and approaches are applicable to older learners. There is less need for innovations in this area as experimenting in practice. Some of the most common approaches and principles in adult education (e.g. self-directed learning) cannot be directly applied to the older adults with low

level of prior education and training experiences. Much of these challenges come from the socio-cultural distance of the two life-worlds, one in adult education and of adult educators and the other that of especially the low-educated older workers.

- A large part of the lack of training provision for older learners may be due to low self-reflection of the adult education systems and due rigidity in the development of the system, but also due to the weak or lacking legal status of adult education in most countries. Nevertheless, it is the adult educators and the management of the training institutions which create the practice. In many cases they seem to have not kept themselves updated with the developmental trends in and needs of society, and their target population.
- The increasing HRD activities seem to challenge especially public adult education. However, these two parallel systems should seek for synergies and cooperation, as to a great extent they represent different, complementary knowledge.
- The policy guidelines for lifelong learning and including of also the older learners are relatively well in place in the EU and increasingly so in the Member States (through not in all of them).
- The research and practice in this area lack behind. On one hand, there is a need for new research-based knowledge on pedagogical - or andragogical/gerogological - and didactical preferences of today's older workers and their learning in the context of work. On the other hand, there is a need for experimenting with innovative approaches to provision of learning opportunities and support for older learners.
- Planning and implementation of learning interventions for older workers need to take place in dialogue between the training providers and older learners, often with a need to involve the employer/management and social partners. The factors for not choosing to participate in the face of apparent opportunities can be complex. Situation-specific factors (at work and home) are powerful. Further, older workers being critical consumers on the learning markets, necessitates that the training outcomes will have to make a difference to one's situation, one way or another. Also, psychological and psycho-social factors (poor self-confidence and self-image as a learner, fears, trust/mistrust, etc.) require a lot of sensitivity and careful attention in particular in case of low-educated older workers.



# 1 Introduction

## 1.1 Increasing learning among older workers – a push for education and training providers

*The last decade has the number of college students in the age-group 40 to 64 years increased with almost 20 percent, to almost 2 million students. The numbers are expected to still rise in the future. - US News and World Report*

The news like above is pleasant reading to all older workers – and to those being concerned for the vast societal ‘shortcoming’ that the lack of attention and development of the learning and training *of* and *for* older workers largely is still today. A change seems to be on the way, partly growing out of necessity in working life and of the needs of older individuals, and partly due to the push on the political agenda in Europe through the Lisbon process. Thus, there is a growing number of older workers who demand for lifelong learning and employers in need of continuous development of the competence (skills, knowledge and attitudes) of their workforce. Consequently, the number of older workers attending various formal and informal learning (Box 1) arrangements is increasing. Partly the demand for training is growing along with the higher educational levels of the new cohorts of older workers. The growing demand for lifelong learning will force educational institutions to change (Sasja, Dowling, Fisser, et al. 2004). At the same time non-formal on-the-job learning (Box 1) has gained in importance, i.e. learning takes place at work without it being organised in any ways, but work can be organised so that it supports this form of learning. This was rather the picture from the perspective of human resources (HRD, HRM).

Interestingly, a corresponding development on the side of adult education is hard to find. This may not be so surprising, however, since the field is still very colourful and fragmented: *“Adult education is recognised and protected only minimally, and variously, in legislation from country to country. So far EU efforts for lifelong learning have done little to alter its formal standing and the public resources allocated for it.”* (EAEA, 2006, 1). Particularly low activity can be observed when it comes to training provision or methodological innovations to promote learning and training for older workers (some activity, such as the Third Age Universities and various community learning, can be found for people outside the working life context). This is not to say that there has not been activity along these lines in adult education: just that these activities and actors have presented single cases here and there. Indeed,

### **BOX 1. Defining formal, non-formal and informal learning**

*Formal learning:* Learning that occurs in an organised and structured environment (in a school/training centre or on the job) and is explicitly designated as learning (in terms of objectives, time or resources). Formal learning is intentional for the learner’s point of view. It typically leads to certification.

*Non-formal learning:* Learning which is embedded in planned activities not explicitly designated as learning (in terms of objectives, learning time or learning support), but which contain an important learning element. Non-formal learning is intentional from the learner’s point of view. It normally does not lead to a certification.

*Informal learning:* Learning resulting from daily activities related to work, family or leisure. It is not organised or structured (in terms of objectives, time or learning support). Informal learning is in most cases unintentional for the learner’s perspective. It typically does not lead to certification.

Source: Cedefop, 2004 (quoted in Descy, 2006).

some institutes have carried out work in this field for decades already (Box 2). When it comes to older workers' learning, particularly to the question most

**BOX 2. Examples of long-established training provision for older workers**

- Senior Studies Institute (SSI) 50+ Employability, Lifelong Learning Centre, University of Strathclyde, Scotland. Established in 1991 'to meet the increasing demand from older people for learning which matched their interests, aptitudes and needs'. SSI works mainly in three areas: lifelong learning, useful learning, widening access, and initiating and supporting research.

From small beginnings, the Institute has grown to become a centre of excellence for the provision of lifelong learning for older people, with more than 3,000 students each year participating in SSI programmes. The Senior Studies Institute is unique in Scotland, and has become internationally recognized for the quality of its educational programme and its expanding role in advising policy makers and business on age focused issues. - <http://www.cll.strath.ac.uk/ssi.html>

The SSI projects are: Advancing 50+ women's employment (AWE), Older workers' learning (OWL), funded by the ESF Equal Programme.

- Programme for Senior Citizens, The Catholic University of Chile. Established in 1989 'to help to improve the quality of life for older people'. The programme consists of three-level studies in gerontology and has also produced textbooks.

The Program offers 30 classes with more than 800 older students enrolled and 3600 students/courses every year in several areas. These include humanities, science and technology, art, health and geriatrics, literature workshops, theatre and body expression, research in gerontology, and the training of counsellors in the health of the older adult with Certificate. - [http://www.uc.cl/english/html/general\\_info/gi15.html](http://www.uc.cl/english/html/general_info/gi15.html)

suitable learning approaches to them in various contexts and within a variety of contents, the evidence and joint European knowledge-base in this area is scattered and in many cases and places still completely lacking. This was the situation in the beginning of the 1990s (Tyler, 1991) at the turn of the millennium (Glendenning, 2001; Kuusinen & Paloniemi, 2002), and largely is still today, as this literature review shows.

The TOP+ project aims to address this shortcoming. We will do this by first collecting existing evidence of learning and training of and for older workers with our

**BOX 3. Who is an older worker? – Source: Tikkanen (forthcoming)**

In the European discussion, particularly in the Nordic countries, an age limit of 45 years has often been used for defining an older worker (Tikkanen & Nyhan, 2006b). Statisticians also tend to take the age of 45 as the demarcation between being a younger (24-44 years) or an older worker (45-64 years) (see Descy, in print). Sociologists have pointed out how age is socially constructed – implying an imposition of false generalizations, distorting stereotypes, and the suppression of differences (Manheimer, 2005) - and that age-definitions (Marin, 1996; Phillipson & Walker, 1986) are always positioned to the particular historical time (Featherstone & Hepworth, 1990; Julkunen, 1996). While early pension policies and the consequent age-discrimination in the 1990s defined 'older' as younger (45+), the increased attention and reforms targeted to the ageing of population in the new Millennium seem to be turning the definition again to higher ages, as suggested by the use of age 50 years by the OECD (2006) in a recent report. In promoting employment, EU has set a benchmark of achieving an employment rate of 50% in 2010 for older workers (defined as 55-64 years old) (European Council, 2005).

Chronology-based age-definitions can be "misleading and dangerous criterion" as there are large individual and cultural variations in the social construction of age (Findsen, 2006). In a European perspective, being an older worker today seems on average somewhat 'younger' than in the USA, where working into higher ages, up to 65 years and beyond, is more common (Employment in Europe, 2004). In a literature review from the USA, Rocco, Stein and Lee (2003) found out that the use of the concept 'older worker' varied within the age-range of 40-75 years. The review showed that defining an older worker as young as aged 40, was related to the formation of retirement decisions, the decline in training opportunities, the dispelling of myths about age and the ability to learn, and the need for older workers to stay on the job to mentor younger workers. Use of age-categories of 70 and 75 years were associated with pre-retirement involvement, being in demand because of their experience and gradual work reduction and training for alternative careers, suggesting that workers feel they should not still be working. Rocco, Stein and Lee (2003) conclude that in defining an older worker, more important than biological or chronological age are life-history and concerns faced at different points in the life-span, and that there is a movement to more subjective definitions of age across the life-span (Buchmann, 1989).

ILO (2002), however, in its Older Worker Recommendation (No. 162) from 1980, which is still highly valid today, defined older workers without any particular age reference, as "those who are liable to encounter difficulties in employment and occupation because of advancement of age". Finally, due to socio-cultural factors and the double discrimination of ageism and sexism, the age to consider women as 'old' is different from men in some countries (e.g. Baltic States) (Fortuny, Nesporova & Popova, 2003; ILO, 2002).

focus on the question ‘*how to facilitate and promote learning among older workers through learning interventions?*’. ‘Older worker’ here refers to a person 45+/50+ - more on the definition in Box 3. On that basis we shall build a model, which can be used in training of older adults. Our focus is on pedagogical aspects. This document is a report from the first part of the work, i.e. here we present the results from the literature review. The report is also the main output from and thus completes the work in the Work Package 2 in the TOP+ project.

## 1.2 Learning of and for older workers? – Clarifying the task

To provide an overview of the theme *learning of and for older workers from the perspective educational planning* – the purpose of this report – is a challenging task. The theme as such is a complex one, located at the intersection of the discourse on older workers (demand) on one hand, and educational planning and development (provision) on the other. A part of the latter discussion is continuing training and education of adult education teachers themselves. The empirical literature, addressing the educational provision in the context of the changing demographic profile of the potential training participants (demand side above), is limited. However, the European Commission and the ILO (2002) and UNESCO (2006), for example, have paid a good deal of attention to the needs for teacher training in general. Part of the challenge in meeting the goals of this paper comes from the fact that the learning intervention (pedagogic/didactic or ‘gerogogic’) perspective to older adults’ learning in the context of working life is poorly covered. Part of the challenge comes from the fact that the field of education has been radically reformed due to the emergence/ acknowledgement of informal and nonformal learning (Box 4). As a consequence, the concept of ‘training’ and the concept of ‘trainer’, as well as the action these two locate to, have become obscure. For example, most of the HR activity can be viewed as training and a lot of what various consultants do, they call training, defining them ‘trainers’ like those working in formal training. Clearly, the TOP+ training model to be developed, to which this report provides groundwork, should be applicable by a range of actors within various contexts and forms of learning related to work and working.

**BOX 4. Nonformal learning into educational planning.** The scope of educational planning has been broadened. In addition to the formal system of education, it is now applied to all other important educational efforts in non-formal settings. Attention to the growth and expansion of educational systems is being complemented and sometimes even replaced by a growing concern for the quality of the entire educational process and for the control of its results. – UNESCO, 2007, p. 9.

In the light of the above, ‘providing an overview’ and building a matrix, presupposes a good deal of creative work. The relevant discourses in this context are many: lifelong learning, older workers, adult education and training, training of trainers, and human resources development (HRD), most importantly. The general knowledge available from these fields is in abundance. This report describes some major lines of discussion in these areas, applicable to planning of learning interventions for older workers. The focus here is on the perspective of facilitators of learning. Non-formal learning by older workers themselves is covered only minimally and indirectly. A further limitation is that the general situation of older adults in working life has not been addressed in this report. For interested readers we suggest the following comprehensive overviews: the European Commission (2006 a-c), Cedefop/EU (Tikkanen & Nyhan, 2006), OECD (2006),

European Foundation (Phearson, 1996), and Reday-Mulvey (2005). There is also a high-level policy report (country reports and a summary) available of the relationship between older workers' employment and lifelong learning from the EU Peer Review carried out in 2007 under the Mutual Learning Programme of the European Employment Strategy<sup>1</sup>. A more detailed description of the goals for this report/Work Package is available in Appendix 1.

### **1.3 Success with learning and training of older workers make or break the Lisbon process?**

The TOP+ topic is one of the key dimensions in the EU's Lisbon process. The strategic goal set for this process is to make Europe *the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion* (Descy, 2006). To this end the challenges are many. Here the focus is on the education system. Indeed, modernising of the system has been called for through a deep transformation of education and training<sup>2</sup>. All the three major goals set to this end – quality, access and openness – are very relevant when we talk about older workers.

Lifelong learning has (LLL) become a discourse on its own, making it an all-encompassing and at the same time elusive concept. A brief look to the concept is provided by Tikkanen (In print), see Box 5. The concept has unusual adaptability and legitimacy, and for these reasons it has been subject to multiple translations over the last twenty years in England and Japan (Okimoto, 2008; Ohsako & Sawano, 2006) and beyond.

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1 A synthesis report and the country reports are available at the Mutual Learning Programme website:  
<http://www.mutual-learning-employment.net/IncreasingEmploymentofOlderWorkersthroughLifelongLearning>

2[http://www.indire.it/lucabas/lookmyweb/templates/up\\_files/socrates//Presentazioni%202008/Grundtvig\\_Seminar-Alessandra\\_Mochi.pdf](http://www.indire.it/lucabas/lookmyweb/templates/up_files/socrates//Presentazioni%202008/Grundtvig_Seminar-Alessandra_Mochi.pdf)

**BOX 5. What is lifelong learning?** – Source: Tikkanen (In print)

The European Commissions Communication on lifelong learning defines it as *"all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competence, within a personal, civic, social and/or employment-related perspective."*

Lifelong learning is therefore about:

- acquiring and updating all kinds of abilities, interests, knowledge and qualifications from the pre-school years to post-retirement. It promotes the development of knowledge and competences that will enable each citizen to adapt to the knowledge-based society and actively participate in all spheres of social and economic life, taking more control of his or her future.
- valuing all forms of learning, including: formal learning, such as a degree course followed at university; non-formal learning, such as vocational skills acquired at the workplace; and informal learning, such as inter-generational learning, for example where parents learn to use ICT through their children, or learning how to play an instrument together with friends.

[http://ec.europa.eu/education/policies/life/what\\_islife\\_en.html](http://ec.europa.eu/education/policies/life/what_islife_en.html)

Cedefop definition for LLL is "All learning activity undertaken throughout life, with the aim of improving knowledge, skills/competences and/or qualifications for personal, social and/or professional reasons."

(Terminology of vocational training policy,

<http://europass.cedefop.europa.eu/europass/home/hornav/Glossary/GlossaryApp/navigate.action>)

A recent book on older workers and lifelong learning from Cedefop shows that even if lifelong learning is generally a concept widely agreed upon across countries and various cultures, some cross-cultural variation in understanding it does exist (Tikkanen, 2006). For example in Japan the concept is understood very widely, and as a broader one than in Europe (Oshako & Sawano, 2006) and the same holds for China.

By and large it is the Lisbon process and related efforts to turn the rhetoric of LLL into reality in our learning society ('knowledge economy'), which has made older workers highly visible as non-participants, if not non-learners (more of participation statistics later in this report, see chapter 4.2.1). Thus, in the landscape of LLL older workers and learners represent a major group (Box 6), now pulled in the centre from the margins (Tikkanen, 1998), at least in political rhetoric if not in deeds.

**BOX 6. European Council Spring Summit** (AGE, 2005)

The Spring Summit is an annual occasion for the Heads of State and Government of the EU Member States to review progress on meeting the Lisbon objectives and to define the general political guidelines of the EU.

- The Spring Summit 2006 considered that preparing for ageing populations was a main driver of structural reform and that further structural reforms were needed to increase the competitiveness of Europe, sustain growth and increase employment.
- The Spring Summit 2007 agreed that greater effort must be put into implementing the revised European Employment Strategy. It was agreed that policies that make it possible to promote solidarity between generations, provide affordable care for dependent groups, promote life-long learning and increase the employment rate of older people are needed.

In terms of employment, this includes the implementation of active ageing strategies, the development of a life-cycle approach to work and the promotion of incentives for prolonging working lives.

<http://www.age-platform.org/EN/IMG/AGE-UK-brochure-web.pdf>

There is an urgent need – a need driven from various sources (working life, citizenship skills, managing one's private life in a high-tech knowledge society, etc.) – to work on several fronts to cultivate more positive learning attitudes (among older workers, colleagues, management, and society at large), update learning skills, improve learning opportunities as well as learning support and guidance for older workers. The Commission has set eight (interdependent) key competencies as focus areas in making lifelong learning (LLL) a reality in Europe.

1. Communication in the mother tongue
2. Communication in foreign languages
3. Mathematical competences and basic competences in science and technology

4. Digital competence
5. Learning to learn
6. Social and civic competences
7. Sense of initiative and entrepreneurship
8. Cultural awareness and expression

The work towards these competences should promote critical thinking, creativity, self-initiative, problem solving, risk assessment, decision making, and constructive management of feelings (Mochi, 2007). Besides specifically occupations-related skills and knowledge, these competences should be the guiding line for the provision of the learning opportunities for older adults, too.

The challenge is immense, however. Above all the challenge in regards older workers gears around the point five above: learning to learn. And loving to learn! Changing attitudes towards learning from the image of hard work and unpleasant endeavour, often in an underdog position, to an individual journey characterised at best with curiosity, joy of learning, and shared moments of pleasure, insight and mastering individually and collectively, whether at work or in formal learning settings. However, the challenge should not be seen as only of the older workers'. However, providing equal opportunities and access to older workers into the world of learning takes a collective effort. Thus, it is equally important that management in the workplaces and providers of adult learning opportunities, private and public alike, social partners, and politicians take the challenge (EC, 2006c; OECD, 2006). Interestingly then, from the training perspective, the challenge of development of job-competence of older workers (skills, knowledge, attitudes) transforms into another competence and learning challenge: namely, that of the adult educators and other staff involved in promoting adult learning (HRD personnel and consultants and alike). With some oversimplification we can say that, in the current situation, while the challenge for the low-educated older workers is to reach towards the centre of learning, the challenge for the adult education providers is to reach outside from the centre and from the mainstream, to meet the older learners in halfway. To learn about their learning needs, styles and preferences.

## 3 Methodology

The analysis is based on a literature review and complementary online survey. To be able to answer to the survey, some partners have also made interviews with key persons in their countries. They have also added on the literature review in their own countries, in their own languages. These references can be found from the partner responses (a separate document available upon request from the author or TOP+ coordinators).

### 3.1 Literature review

The review was carried out by having focus on *learning among older adults and the pedagogy related to that*. Given the limitedness of such a specific literature, the literature search was extended to include some perspectives to *lifelong learning and adult learning* more generally. Besides the latter two, other search terms used were: *adult education, adult training, train-a-trainers, andragogy, gerogogy, and age/ageing/older workers and learning/training*. Also e-Learning is covered. Various databases were used for the literature search: ArticleFirst, BlackwellSynergy, ERIC, ISI Web of Science, Science Direct, PringerLink, and Google. Additionally, some particularly relevant journals were reviewed separately: *Educational Gerontology, Education and Ageing, Adult Education Quarterly, Adult Learning, PAACE Journal of Lifelong Learning*<sup>3</sup>, and *The Journal of Widening Participation and Lifelong Learning*. Overall, there was very little literature available on older/mature workers or learners from the pedagogical (intervention) perspective. However, more material was available on very old learners, those who have largely left active working life, for example students in the Third Age Universities. In this review the knowledge from this field is included to the extent it is (assumed to be) relevant to the target group of older workers.

### 3.2 An online survey

An online survey was carried against to complement the picture gained through the literature review. We assumed there might be more activity in this area, which was not documented and/or not available in the English language. The survey was sent to all TOP+ partners through an e-mail. Partner countries that responded to the survey were: Belgium, Cyprus, Germany, Greece, Norway, Poland, Portugal<sup>4</sup>, Romania, and Sweden<sup>4</sup>.

The survey was divided into seven main themes as follows:

1. National framework for learning and training of older workers
2. Key-issues concerning lifelong learning and older workers
3. Learning possibilities available for older workers
4. Competence and competence development of the teachers of older adults

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<sup>3</sup> <http://www.coe.iup.edu/ace/PAACE.htm#Journal%20Contents>

<sup>4</sup> The response from Portugal is not included and not all of 'the answers' from Sweden were used in the analysis. For Portugal the reason was that the survey was never received in a format possible to open. Regardless of two requests, the partner(s) from Portugal did not send the file again and in a receivable format. For Sweden the reason was that the partner had chosen to answer to about half of the questions simply with web links to various sources. Some of them were opened, but as many of them referred to large reports, the time did not allow for the authors of this report to find the answers.

5. Learning needs and informal lifelong learning among the teachers of older adults
6. Monitoring of participation in adult education (including informal learning activities)
7. Best and worse practice of lifelong learning initiatives targeted to older workers

The partner survey was extended also outside the TOP+ partnership. This resulted in enthusiastic responses from 14 countries and 24 individuals from Europe, Japan, Australia, USA and South-America (Chile). However, in this report we will only discuss the results from the TOP+ partner countries.



## 4 Results from the literature review

This chapter describes the results of the literature review. The selection of the topics reviewed, follow the lines in the discussion on older workers from the perspective of their learning and training participation. Naturally, many of the themes relevant for older workers are part of the more general discussion on adult learning and education. For example, *The European Association for the Education of Adults* (EAEA, 2006) listed the following issues and action to take to take adult learning and education forward in Europe: quality and development in adult education, recognising and validating other forms of learning, basic skills and key competencies, active citizenship and adult learning, local learning centres, partnerships and decentralisation, the research base for adult education and learning, and the training and development of adult education personnel. This review, however, focuses on the special features of older workers in the overall discussion on adult/lifelong learning. The relationship of these lines of discussion as well as the characterisation of the target group is illustrated in figure 1 (Tikkanen, in print). The focus of this review is located at the intersection of the broad fields of lifelong learning and a life-course perspective to working life and careers. Within the lifelong learning discourse our main interest will be in adult education, and under it, primarily in work-related learning.

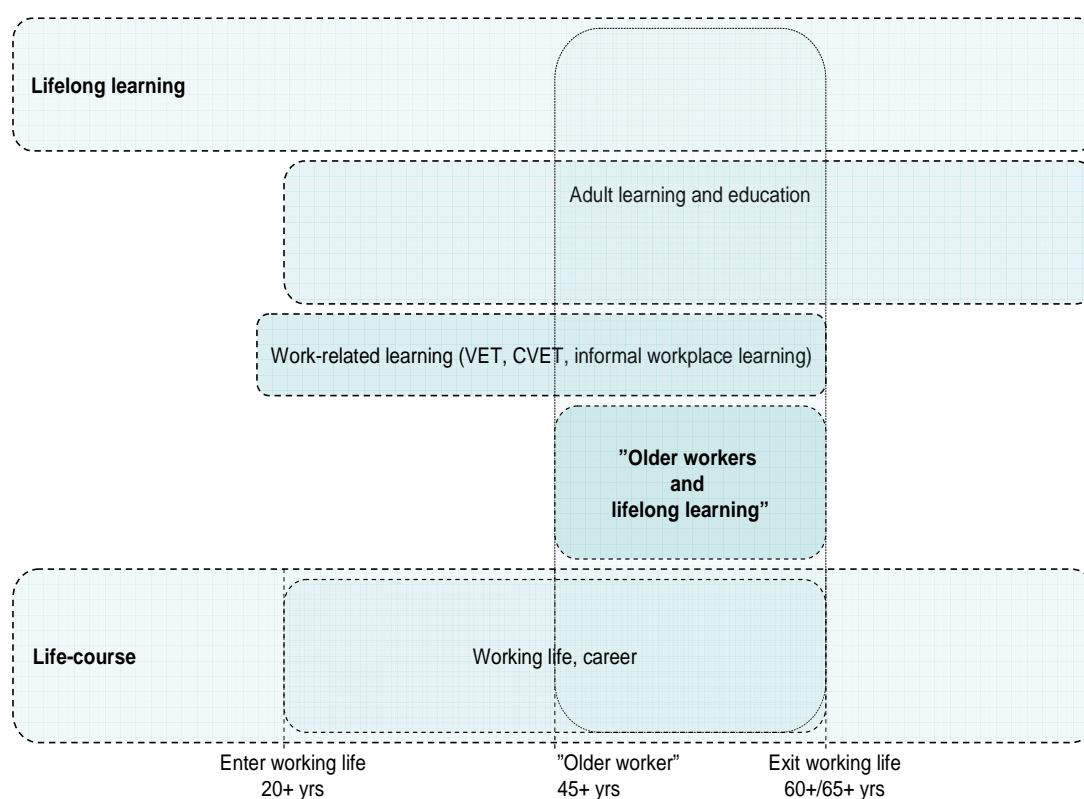


Figure 1. The theme of older workers and lifelong learning at the intersection of lifelong learning, life-course and work careers. Source: Tikkanen (in print)

## 4.1 Theoretical perspectives: From pedagogy, to andragogy, to gerogogy

This chapter examines some major pedagogical approaches to learning in later adulthood. The starting point here is that just as children and young people learn differently from adults, differences can also be found between younger and older adults' in learning styles, preferences and needs (Box 7). Facilitators of learning of and for older adults need to understand and take into account these differences. The pedagogical considerations in case of older workers have been specified under a field of education called *educational gerontology* (Glendenning, 1990; Glendenning & Percy, 1990) (also industrial gerontology, Sterns, 1990). The didactical approach thereunder is sometimes called *geragogics* (Berdes, Zych & Dawson, 1992) or *gerogogy* (Battersby, 1987; 1990; Glendenning, 1992). The latter are drawn from the more general principles of adult education and *andragogy* (Battersby, 1987; 1990). The two early readings describing this field of study and practice are (Berdes, Zych & Dawson, 1992) (Glendenning & Percy, 1990). A central source for current developments in this area is the journal *Educational Gerontology*.

The term educational gerontology was used first time in 1976 by D.A. Peterson (1976) from the USA, suggesting that educational gerontology is a field of research, education and practice located at the intersection of adult education and social gerontology. The field covers (i) education for older adults, (ii) public education about ageing, and (iii) education of professionals and para-professionals in the field of ageing. 'Gerogogy' -term follows the logics of pedagogy ('peda' referring to children) and andragogy to mark educational principles of and for adults. The basis for gerogogy – most relevant for the purpose of this review – is formed by the knowledge and theory, which we have of the functional changes by age in the human life course, of educational gerontology and of the learning activity and participation of older adults (Battersby, 1990; Glendenning, 1992).

However, not all older adults wish to participate in learning with only other older learners. While the reasons for that can be many, it has also been pointed out that specifying and separating learning and training provision for older adults from the rest of adult education, can in itself represent age-segregation, to underline ageist attitudes and to undermine the essence in lifelong learning (Glendenning, 2001). A further argument is that "what applies to adults applies to older people but to a higher degree"

### BOX 7. Older and younger people learn in different ways

"When considering continuing training, especially for seniors, it needs to be taken into account that older people and younger people learn in different ways and that although the outcomes are similar, older learners do display a reduced ability to learn with supplied materials, they lack learning methods and they are hindered by the speed at which some course material is offered. They also require more repetitions and their concentration while learning is easier to disrupt. On the other hand, they are equipped with some good learning qualities: they are able to compare new facts with existing knowledge, they have generally already learned to work independently and un-aided, their views are more problem-focused and they can handle complex facts more easily. Ignoring these qualities could cause older workers to become averse to learning (Volkoff, 2000). While the younger generation more often than not already acknowledges the concept of lifelong learning, older employees might have a certain amount of resistance to learning and change that has first to be conquered. Learning is recognised by the older generation as preparation for a profession and a request for them to engage in additional learning after reaching a competent level could be misunderstood as a humiliation (Geldermann, 2005). Often, people who are most in need of education and training are also those least aware of the need to improve (OECD, 2003c)." (Ageing and Employment, 2006, p. 113)

(Plett, 1990), i.e. general adult education principles and good practice are applicable also to older learners.

#### 4.1.1 Lifelong learning in formal, informal and nonformal context

Lifelong learning (LLL) is a complex concept (see Box 5), reflecting the wide variety of learning activity from cradle-to-grave. From the perspective of education it sets the stage for more general perception of educational processes, and within an educational system which should become a diversified set of activities, serving all ages in the population by providing opportunities to learn a variety of content using different methods (Evans, 1981). LLL is a decisive factor for both the individual career development and the profitability and competitiveness of firms (Onsktenk, 1992).

**‘Training’ and ‘trainers’ – conceptual blurring.** It is not necessarily clear ‘which activities and learning experiences are considered to constitute “training”’ (Pearson, 1996). On-the-job-learning poses a particular challenge to developing of learning interventions (‘training’). Mentoring, coaching, and job rotation are typical forms of skills training in the context of work. Informal and nonformal education in general – the much older system of education in the human history than the formal one (Evans, 1981) – is posing a challenge to the adult education system, setting new requirements also to trainers of adults. The challenge lies in the immensely diverse collection of educational enterprises in the area of informal and nonformal learning, with widely divergent goals, methods and outcomes (Evans, 1981). This diversity, however, is essential for lifelong learning to become reality. Kendall (2006) argues that “(t)he convergence of formal and informal learning communities provides the basis for real lifelong learning, a process accelerated by the role of information and communications technologies removing traditional barriers to learning and empowering communities to take actions to meet their own short and long-term needs” (Kendall, 2006). Adults, older and younger alike, prefer to learn in informal settings.

How, then can learning be facilitated in these settings? What kinds of role and competence demands are being set to trainers? These questions are not new even if there is a lot still to be solved. The following quote dates back more than a quarter of a century, but the questions are largely valid still today:

Nonformal education presents a challenging problem for today’s educational planners. The diversified nature of the activities included in nonformal education poses difficult questions for those wishing to apply systematic traditional educational planning procedures to this field. What purposes can and should nonformal education serve? What educational activities should be included? How should these activities be related to formal education? Can nonformal education be effectively planned, and if so, in what ways and by whom? With increasing attention and resources being given to nonformal education in many countries today, the competencies of educational planners must be developed and expanded to include effective methods of working in this area of educational planning. (Evans, 1981, p. 11)

A large part of the challenge here lies in the fact that learning needs in working life call for the trainers to meet the learners there, instead of the traditional setting: trainer waiting for the learners approach him or her to attend formal training. In the latter model the hegemony (control and authority) has been (and still largely is) held by the trainer. In the context of the workplace, non-formal learning, the learners, especially the experienced older workers, can be equally strong with their knowledge, even if within a limited area of expertise. Planning of education in this changed and changing learning

landscape poses a huge challenge to educational planning and design, especially from the point of view of non-formal/informal learning (i.e. also within human resources development, HRD).

#### 4.1.2 Approaches to adult learning

The idea in having different approaches to learning in different phases in the life-course draws from the fact that human life periods are different from each other in terms of physiological, biological, psychological and social aspects and characteristics, and that it is necessary to take these differences into account when designing learning interventions to people in different phases in their life-course. Furthermore, when it comes to adults, as individuals we become more different than similar by age. Also, the learning styles and learning needs change over the course of a lifetime (Evans, 1981). This poses a particular challenge to designing learning for older adults. This challenge is accentuated by the fact that within the existing education and training systems and approaches, there is little to explicitly build on (i.e. that the learning requirements of adults beyond say 40 years of age or so, and with low-education, would have been explicitly addressed). However, within the movement of the Third Age Universities (U3A) older adults themselves have been at the centre and the driving force throughout the history of the movement. U3A is targeted to adults who principally are no longer active in working life, so their learning models have somewhat limited value when it comes to developing work-related skills and knowledge of and for older workers. However, this is not to say that we can not apply a good deal of the knowledge, models and approaches in adult education to learners beyond their 40'ies, even if little of it would have been done previously. The rest of this section presents first some widely used approaches to adult training and after that specific perspectives to older learners.

Self-directed learning: The term ‘andragogy’ was introduced by Malcom Knowles (1973, 1974) to refer to the following special characteristics in adult learning and teaching: problem-centredness, self-direction and autonomy – more so than what was seen to be the case with children and young people’s education at that time, the 1970s (Smith, 2005). His arguments for self-directed learning were as follows:

- “1. There is convincing evidence that people who take the initiative in learning (proactive learners) *learn more things, and learn better*, than do people who sit at the feet of teachers passively waiting to be taught (reactive learners). 'They enter into learning more purposefully and with greater motivation. They also tend to retain and make use of what they learn better and longer than do the reactive learners.'
2. Self-directed learning is more in tune with our natural processes of psychological development. '*An essential aspect of maturing* is developing the ability to take increasing responsibility for our own lives - to become increasingly self-directed'.
3. Many of the *new developments in education put a heavy responsibility on the learners* to take a good deal of initiative in their own learning. 'Students entering into these programs without having learned the skills of self-directed inquiry will experience anxiety, frustration, and often failure, and so will their teachers.' (Knowles 1975, pp. s14-15 - quoted in Smith, 2005)

Expansive learning: Yrjö Engeström (1994) has defined a particular approach to adult learning, expansive learning. The approach draws from the cultural-historical school of thought. This model includes a description of ‘the golden rules of teaching adults’:

1. Cover less subject matter in your teaching, but teach it better and more thoroughly.
2. Do not be content to teach “ready-made” decontextualized facts and skills. Always ask “why” and encourage students to do the same.
3. Evoke in the students substantive motivation, an interest in the use value of the subject matter. Search for inner contradictions in practices and in knowledge.
4. Draw up an orientation basis that reveals essential principles of the subject matter. Use the orientation basis as an intellectual tool in formulating and solving student tasks.
5. Aim at cycles of investigative learning, including steps of motivation, orientation, internalisation, externalisation, critique, and control. Facilitate and guide this designing a complete instructional treatment of each thematic unit.
6. Plan your teaching with care. Prepare a curriculum. Compare your instruction continuously with your curriculum. Note success and breakdowns as well as new insights.
7. Require a lot from the students, but respect them as well. Stand behind your words – take what you teach seriously and form your own views about it. (Engeström, 1994, pp. 121-122)

Training of older workers: Much valuable work, especially with a bottoms-up approach, to address the situation of older learners, has been carried out in the UK for several decades. Their work has been pioneering in developing the area of educational gerontology (Glendenning, 1992, 2001). As early as in the year 1990, Peter Plett defined six basic findings to keep in mind when designing a successful training programme for older adults:

1. They want to be taken seriously as adults.
2. They have much life experience on which training should be based.
3. They have a strong sense of the practical on which training should be based.
4. They may no longer be familiar with learning (strategies) or being trained in formal settings.
5. They know about time. They will not waste time on things of little value, but they may need more time for learning.
6. They believe mostly what has been told them for many years that they have less ability and capability than younger people and are wanted less. (Plett, 1990, pp. 88-89)

The principles for learning guidance among older learners have been presented by the Finns Jorma Kuusinen and Susanna Paloniemi (2002). This work relates to the long line of work – among longest in Europe – to address the situation of older workers, also from the perspective of learning and education (Tikkanen, 1998). The principles by Kuusinen and Paloniemi (2002) are as follows:

1. Teacher as a supporter and facilitator for the active participation of the learners.
2. Prior knowledge and experiences as a basis for an understanding and problem-based learning.
3. Social interaction enables externalisation and new insight.
4. Understanding own learning and the learning process is an essential object for reflection.

5. Continuing development of the trainers as a part of the learning facilitation of the older learners.

## 4.2 Older workers' participation in training

In this chapter we will look at the models of participation, actual participation rates, and finally some critical aspects in participation.

### 4.2.1 Explaining participation

There are various perspectives to how to explain the participation in adult education. Manninen (2005) has provided an overview of the theories in a project which focused in particular on the learning motivation of lower qualified workers (Manninen & Birke, 2005). Therefore, his presentation is especially relevant here. Table 1 provides a synthesis of the different explanations: sociological, psychological, interactional and 'modern'.

Table 1. Changes in the models of explanation for adult training participation. Source: Manninen (2005)

	Models of explanation			
	Sociological	Psychological	Interactional	Modern
Explanations sought from	External causes	Internal causes	Interaction of causes	Individual decision-making
Key elements	Work Society Social class Opportunities Obstacles	Motives Traits Personality Interests	Socialisation Experiences Felt needs Relevance Expectancy	Images Values Feelings Stories
References	Lehtonen & Tuomisto, 1972; Rinne et al. 1992	Boshier 1973; Garrison 1987	Rubenson 1979; Pintrich & Ruohotie 2000	Manninen 2004; Manninen et al. 2004

We can see that the models of explanations have evolved over time and therefore draw from the varying historical-societal context and circumstances. The 'modern' explanatory perspective has contact points with different constructive perspectives to adult learning emphasising 'human agency' (Billett, 2008; Billett & vanWoerkom, 2006), identity conceptions (Olesen, 2006; Paloniemi, 2006) and emotional competence (Gendron, 2004; 2008) as explaining engagement in work and learning. These perspectives, together with the interactive model, are particularly interesting and relevant when explaining older workers' participation behaviour.

### 4.2.2 Participation rates

Adult education has always at least implicitly been for adult of all ages. The practice, however, and for various reasons, has turned out to be defined and formulated so as to mostly attract adults up their forties or so. As adult education has been remade into a part of lifelong learning, the situation seems to change very slowly, albeit with a lot of variation between the European countries. Table 2 shows the participation rates in the

Table 2. Participation in lifelong learning (excluding self-learning) of adults 24-65 years in 2000 and 2005 (%). The 5-year changes shown as %-units (Tikkanen, 2008).

Country	2000	2005	Change	Country	2000	2005	Change
Sweden	21.6	34.7	+13.1	<b>Germany</b>	<b>5.2</b>	<b>7.4</b>	<b>+2.2</b>
UK	21.0	29.7	+8.7	Lithuania	2.8	6.3	+3.5
Denmark	20.8	27.6	+7.2	Italy	5.5	6.2	+0.7
Iceland	23.5	26.6	+3.1	Estonia	6.0	5.9	-0.1
Finland	19.6	24.8	+5.2	Czech Republic	n.a.	5.9	
Norway	13.3	19.4	+6.1	Malta	4.5	5.8	+1.3
Slovenia	n.a.	17.8		Cyprus	3.1	5.6	+2.5
Netherlands	15.6	16.6	+1.0	Poland	n.a.	5.0	
Austria	8.3	13.9	+5.6	Slovakia	n.a.	5.0	
Spain	5.0	12.1	+7.1	Portugal	3.4	4.6	+1.2
Belgium	6.8	10.0	+3.2	Hungary	3.1	4.2	+1.1
Luxembourg	4.8	9.4	+4.6	Greece	1.2	3.7	+2.5(*)
Ireland	n.a.	8.0					
France	2.8	7.6	+4.8	<b>EU-25</b>	<b>7.9</b>	<b>10.8</b>	
Latvia	n.a.	7.6		Euro area	5.6	8.7	

\*For Greece figure taken from Europe in figures 2005, reporting years 1999 and 2004.

Source: European Commission, 2006. *Indicators for monitoring the Employment Guidelines*.

EU25. Some countries are far ahead and other far behind the European Union 12.5% benchmark (Table 2). Furthermore, the table shows that the countries in which the participation rates were high already in 2000 are also the ones who have most increased their participation rates during the following five years' period.

Table 3 shows the aggregated participation rates by educational level in EU25 and separately in the old (EU10) and new (NMS10) Member States. The findings confirm the accumulation thesis in adult education: the haves are getting more, while the

Table 3. Participation trends in lifelong learning (25-64 years) by educational level (%). Change between 2000-2005 calculated as %-units (Tikkanen, 2008).

	2000	2001	2002	2003	2004	2005	Change %-units
Low education							
EU25	2.3	2.2	2.1	2.7	2.9	3.4	+1.1
EU15	2.5	2.4	2.3	2.9	3.1	4.6	+2.1
NMS10	-	-	-	-	-	-	-
Medium education							
EU25	8.5	8.4	8.5	9.5	10.4	10.6	+2.1
EU15	9.8	9.7	9.8	11.0	12.2	12.5	+2.7
NMS10	4.4	4.4	4.2	4.7	4.9	4.4	0
High education							
EU25	15.8	15.4	15.4	18.2	20.2	21.1	+5.3
EU15	15.9	15.4	15.6	18.6	20.8	22.1	+6.2
NMS10	14.9	15.7	14.4	15.4	16.0	14.2	-0.7

Source: European Commission, 2006. *Indicators for monitoring the Employment Guidelines*.

changes for the have-nots are minimal (Table 3).

Furthermore, the findings confirm that implementation of lifelong learning in Europe has not yet managed to materialise the second chance for education for the low-educated – who are often also older workers.

Table 4 describes the participation rates and trends 2000-2005 for only older workers (45-64 years). From the table we can observe level effects in participation both between the two age groups 45-54 years and 55-64 years, as well as between the EU25, EU15 and NMS10. The table also shows how the old Member States have increased their participation rates for older workers more during the five years' period (2000-2005) than the EU25, while there is basically no change in the NMS within the same period.

Table. 4. Older workers' (45+) participation in education and training. Trends 2000-2005 (%)

	2000	2001	2002	2003	2004	2005
<b>45-54 years</b>						
EU25	5.7	5.7	5.6	7.1	8.1	8.5
EU15	6.3	6.3	6.3	8.0	9.2	9.8
NMS10	3.0	3.0	2.7	3.0	3.3	2.9
<b>55-64 years</b>						
EU25	2.8	2.8	3.1	3.9	4.8	5.1
EU15	3.0	3.0	3.3	5.4	5.4	5.9
NMS10	-	-	-	-	-	-

Source: European Commission, 2006. *Indicators for monitoring the Employment Guidelines*.

#### 4.2.3 Critical factors for older workers' participation in organised learning activities

In the education and training markets older workers tend to be critical, no-nonsense consumers. Participation only for the sake of 'being active' or 'having fun' is not an option, as it may be for young people. For an older worker time and effort should matter, and therefore the expected benefits from training participation need to be clear - also to their employers. Participation in formal training is a matter related to training outcomes and incentives for it in the workplace (Tikkanen, 2008). Most of older workers quite rightly want to know, "what's in it for me, in my workplace?" Obviously answering the question is not always easy. The Eurobarometer 2004 showed that one third of the 55+ workers do not know what would encourage them to take more training (Lipinska, Schmidt & Tessaring, 2007). A similar message is being conveyed by the findings presented in boxes 8 and 9. The study from Finland (Box 8) shows that employers' and older employees' (45-64 years) views are rather different when it comes to the importance of increasing educational possibilities and training that promotes occupational skills: while 40% of employers believe training to be important, only 13% of the older workers do so. A corresponding finding is presented by the study from the USA (Box 9): while almost half of the employees (44%) have been offered opportunities for training and skills development, only 19% find them helpful in their



**BOX 8. Employees' (aged 45-64 years) and employers rating of actions which can be important for older workers for continuing in working life (%).**

Action	Employees	Employers
1. Improving possibilities for rehabilitation	37	34
2. Increasing wages	35	22
3. Reducing workloads and tight schedules and increasing options to affect work	32	56
4. Improving the work environment	28	71
5. More flexible working hours	27	32
6. Improving management skills and good supervisory action	21	68
7. <i>Increasing educational possibilities and training that promotes occupational skills</i>	13	40

Employees: Work Conditions 2003 study, Statistics Finland

Employers: Services for the workforce and Job Vacancies study 2004. (Ilmarinen, 2006, 83)

own situation. It is an interesting question – so far without an answer – to what extent these findings reflect the relevance, contents and quality of the training provision, on one hand, and to what extent they are related to the job situation – job demands, competence and learning demands, perceived and real career possibilities, etc. – and the actual skills and knowledge (in relation to their job tasks) of the older workers.

**BOX 9. Programmes employees are offered versus what they find helpful (%).**

Action	Offered	Find helpful
1. Ability to work part-time	46	49
2. <i>Opportunity to training and skills development</i>	44	19
3. More flexible work schedule	39	48
4. Opportunity to act as a mentor	20	17
5. Ability to take sabbatical	19	25
6. Ability to work for your employer as a contractor after retirement	17	24
7. Ability to work from home	15	36
8. Retention bonus	7	28
9. Credits to pension benefits for delayed retirement	5	25
10. Ability to collect a partial pension while working	5	25

Source: AARP (2007, p. 13) – Based on a survey with a response rate of over 8200 persons, over 1000 persons from each G7 country.

The activity aspect aside, for an older worker training is a wider issue than solely one of improving job-competence. The following issues are important dimensions in an older worker's decision to take training – and therefore should also be such for adult educators, HR personnel, and management (Tikkanen, 2008):

- For any worker, but even more so for an older worker (with options for exit), issues like dignity and being appreciated and respected play a very important role. Poor self-esteem, self-confidence & self-assessment skills, combined with outdated learning skills can be a powerful hindrance to learning participation, albeit not necessarily easy to express or explicate. In the current youth-favourable and technology-heavy working life, higher age alone can lead to lower self-esteem (e.g. perceived age-discrimination) and together with low qualifications can widen the experience of (real or assumed) a *generation-gap* (marginalisation).

- A worker's identity is largely defined by his or her work (Billett & vanWorkum, 2006; Henning, 2006; Paloniemi, 2006). Thus, recognition and validation of older workers' skills and knowledge, their 'real competence', is to recognise the value of their lifelong learning and their contribution in their workplace. Such an appreciation can be a powerful motivator for further learning activities.
- Provision of training and other learning opportunities and access to these in a workplace can as such be taken as signals for youth-favouring company policy. As the tables in boxes 8 and 9 indicated, simply providing learning opportunities for older workers is not necessarily sufficient to motivate them to seek to participate in it. Much support and encouragement with high sensitivity can be needed in case of low educated (Hulkari & Paloniemi, 2008).
- Guidance can arouse awareness of learning needs and interest in participation: People who receive guidance have more positive attitude towards training, which also leads to higher benefits (Eurobarometer/Lipinska, Schmid & Tessaring, 2007).
- Both intrinsic and extrinsic rewards are needed for participation (Eyers, 2000). Financial support is important but not a sufficient precondition for participation. Less than 2 in 5 European citizens say financial support would be an incentive to undertake more training – matters more in the new Member States (Eurobarometer/ Lipinska, Schmid & Tessaring, 2007)."

## 4.3 Training provision for seniors

### 4.3.1 HRD and learning in the workplace

Workplaces, with or without the help of the HR function, have become the most central arenas for continuous learning and competence development. This is also likely to be the arena where the best and worst examples of learning of older workers are to be found (Boxes 10 & 11). Unfortunately, these examples are seldom documented and therefore they only to a limited extent transform into more general learning and new knowledge. However, since the 1990s several major projects have been carried out to monitor and document cases where the issue of older workers have been addressed in companies, often including a learning dimension: Ageing and Employment (2006), Ilmarinen (2006), Naegele & Walker (2006), OECD (2006), ILO (Schneider, 1980), Walker (1999), Taylor (2006), Tikkanen & Nyhan (2006), Tikkanen (in print). Only the last two are exclusively focusing on learning and training interventions targeted to or including older workers.

#### **BOX 10. Workplaces have become central learning arenas – also for older workers?**

"[P]ractices such as multi-skilling and use of self-managed work groups, have meant that in these organizations the workplace has become a source of continuous learning for all employees. In addition to any technical skills they acquire, workers have to use their intellectual faculties to tackle unexpected problems for which there is no immediate recourse to technical specialists. Furthermore, a number of studies show that the learning environment in the company is decisive for learning capacity. (...) Research in the area of industrial sociology and training further shows that workplace related and experience-based learning are important. Work needs to be organised in a way that optimises the possibilities for experience-based learning (Ageing and employment, 2006, p. 113).

Some research projects have also been carried out with a focus on learning and training of older workers. The results of the WORKTOW (*Working life changes and training of older workers*) project that encompasses 27 case studies in SMEs showed that successful work-based learning and training interventions involving older workers have the potential for improving their motivation for learning, for strengthening their self-confidence and organisational commitment (Tikkanen, Lahn, Withnall, *et al.*, 2002). The project introduced new methods of analysing individual learning-style preferences drawing on research from the USA and demonstrated the value of developing a learning and work history ('biographical') approach (Tikkanen *et al.*, 2002).

Especially in retail, car manufacturing and the financial services good examples can be found of training accessible to all employees. This 'employer trusting' behavior indicates that such firms "may well have recognized the business case for retaining, training and re-training older workers in terms of transmission of skills, promoting diversity in the workforce and keeping up with demographic change" (Alferoff 1999, p. 55). The Investors in People Programme (IIP) and Training Enterprise Councils (TECs) are examples of training frameworks including older workers and of building bridges between the formal and non-formal/informal learning. These learning opportunities are often organized as Employee Development (ED) programmes, which are also suitable to smaller companies (Alferoff 1999). EDs can be low cost and flexibly arranged, taken by employee's own time and with respect to the individual's particular learning interests and needs. Thus EDs can effectively enhance and facilitate workplace learning. An example is Ford's *Employee Development and Assistance Programme* (Alferoff 1999).

**BOX 11. Workplace learning and experienced employees**

"[F]rom the perspective of experienced employees, factors such as organizational culture and history, the way jobs are designed and work is organized, and the way people are managed and their performance is judged, help explain the lived realities of workplace learning and provide messages for enhancing workforce development." (Fuller & Unwin, 2005, p. 21).

#### 4.3.2 Formal training

The training of and for older workers was discussed to some extent already in the early 1990s. Today we can still largely confirm Plett's (1990) conclusion that training activities 'targeted at older workers are very scarce, at least hard to identify' but these appear to be more common in the USA, Canada and Japan, where people also tend to work longer in average than in Europe. Existing statistics show that older workers are both offered less training opportunities, and that they participate less in training. On one hand, this has been attributed to ageism, as one form of age-discrimination in the working life. Related to that, it has been pointed out that the "lack of training received by older workers is dominantly a symptom of broader problems they face. And it is these broader problems that deserve prime attention." (Mayhew & Rijkers, 2004). Economist, on the

**BOX 12. Harnessing the critical reflexivity of older workers in a constructive way**

"In developing methodologies for teaching and learning with and for older people there would seem to be advantages in harnessing some of the positive features of the ageing process. These include the ability to develop a critical reflexivity that can comprehend stability within change and flux, and which also recognizes and values this stability as an indicator of the contribution that a long and unique experience of life can offer." (Gaskell, 1999, p. 273).

hand, have commonly used human capital theory, in particular the Return On Investment theory (ROI) to approach training of older workers. According to the human capital theory "costs of investments in human resources are incurred in expectation of future benefits. With regard to older workers the human capital theory would basically suggest that returns from training investments are expected to decline with age." (Ageing and Employment, 2006, p. 128).

Thus, investment in training of older workers has not been seen as profitable as in younger workers - even if the potential gains (knowledge gap) should be much larger in case of older workers. It has also been argued that in the continuously changing working life, the half-time of the skills has become much shorter for all workers, not only the older ones.

However, the learning and developmental activities targeted at or including older workers, which were mentioned in connection with HRD and learning in the workplace (previous section), can also include formal courses (e.g. typically in IT) as a part of the overall programme. An overview made in a Leonardo project (Tschöpe, 2006) lists instruments for training of older employees. However, the programmes and projects listed also here, mostly have an inclusive approach to learning promotion of workers, rather than exclusively focusing on the learning and education perspective. The problem with such an approach is that learning activities are seldom reported in details. Even if multi-perspective, comprehensive programmes and approaches are preferred to address the situation of older workers, the downside for our purposes in this report is that the learning perspective tends to get less attention explicitly. There is some evidence suggesting that general training provision (targeted to all employees), with an inclusive approach to older workers, does not attract older workers but comes easily to serve the most the younger and higher educated. As also the findings shown in boxes 8 and 9 earlier in this report implied, there is a need for more targeted training measures for older workers. A survey carried out as a part of the ESF project Fairplay (van Dalen, Henkens, Hendrikse & Schippers, 2006), targeted to employers, found out that 10-18% of the companies (10% in Greece, Spain, the Netherlands – 18% in the UK) had provided training to their older workers as a specific measure to retain their older employees. The AARP study showed that 44% of the US-companies had done so (Box 9). Better picture from the European situation is expected as the results of the third vocational training survey (CVT3) will be published.

The age-management perspective underlines that learning and development are central strategies for mature worker retention (Age and Employment, 2006; Ilmarinen, 2006; Naegele & Walker, 2006). A *good practice* in training and lifelong learning means ensuring that older workers are

- not neglected in training and career development, - that opportunities for learning are offered throughout working life,
- that training methods are appropriate to older workers, and that
- positive action is taken where necessary to compensate for discrimination in the past

**BOX 13. A need for radically new approaches for older workers?**

"Good things for an over-50 workforce are good for all of the workforce" (Carole Smith in AARP, 2007, p. 14).

Principles for successful training of adults, usually work for older adults as well. Training background is often more differentiating factor than age as such. (Plett, 1990)

(Walker, 1997).

As an approach and implementation of training in age-management the Age and Employment –project (2006) made the following conclusions and recommendations:

1. “In some companies training needs for all age groups are identified in the context of career management;
2. Statements of human resources managers that training is accessible to all age groups may need to be regarded with some caution, as there are no supporting statistical data. However, simply avoiding age-barriers to training is clearly not enough;
3. Experience-based and self-directed ways of learning are particularly sensitive approaches for older workers;
4. Some companies offer training courses to tackle specific skills which gaps older workers may have (e.g. in ICT, languages);
5. In the context of knowledge transfer, older workers might receive specific training to take over a role as a tutor;
6. A few case studies show how training and outplacement can help older workers to improve their chances of finding a new job. However, there is little evidence as to whether these approaches were indeed successful;
7. Training often accompanies other measures, particularly measures to increase the internal mobility or the multi-skilling of employees.” (Age and Employment, 2006, p. 202)

The following activities have been suggested to ensure that learning and development activities include mature-aged workers and take account of their learning styles:

- Analyse on-line learning strategy for suitability for mature aged
- Survey computer literacy skills of target group
- Identify suitable providers/programs for up-skilling identified mature aged
- Pilot training program/s; evaluate and modify for inclusion in L&D programs
- Implement strategy
- Promote traineeships to mature aged to enhance skills development
- Identify additional supports or training required to ensure success of strategy
- Incorporate any additional L&D programs required in regional L&D plans
- Monitor, evaluate, modify and report centrally on initiatives and outcomes
- Incorporate learning. (*From awareness to action*, 2006, p. 33)

#### **4.3.3 Older workers as hard-to-reach learners – A role for the social partners?**

The role trade unions play in promoting lifelong learning and career development among their oldest members varies from union to union and from one country to another, although the importance assigned to lifelong learning among unions appear to be on rise (ILO, 2000). In fact, in many countries social partners are active in promoting of lifelong learning and providing training in general. However, until recently expanding the working careers of older workers has not been on their agenda (Tikkanen, 2006). This is not surprising, however, as one of the major focuses for the unions traditionally has been negotiating shorter working time and early exit pathways. Consequently, relatively little material (literature) is available from or on this particular perspective.

Towards the end of the 1990s Walker (1997a) concluded his European study by stating that there was no evidence for signs of ‘partnership between the social partners on the

way forward with regards to age and employment' (p. 40). About ten years later there are signs that trade unions have started to adopt a more proactive role towards the training needs of older workers. In the UK, trade unions are viewed as important conduits for advice on learning for older workers in particular as approaching their employer in this regard is something they may wish to avoid (Stuart & Perrett, 2006). The British public-sector union, Unison, for example, has 39 education and training officers (ILO, 2003).

The European research project *Ageing and employment* (2006), which was focused on identifying good practice to increase job opportunities and maintain older workers in employment, described the ambiguous role of social partners when it comes to older workers:

“The role of the social partners and, in particular, of trade unions with regard to ageing is rather ambiguous. This translates in many countries into a mix of opposing strategies at the different levels of intervention. Thus, trade unions may oppose the lengthening of working life at national level, whilst bargaining on the best way to enhance the ‘work ability’ of older workers at company or workplace level. Furthermore, for many years social partners have pursued two strategies: (a) they followed a seniority-based approach which became apparent in seniority wage systems and redundancy rules protecting older workers and at the same time (b) encouraged the early exit of older workers from the labour market. This strategy mix is now discouraged as the possibilities for early retirement have been restricted and retirement age increased in a number of countries. (Ageing in employment, 2006, s. 163.)”

The study showed that trade unions are in “an especially difficult position”, but also that they should develop clearer strategy in response to demographic change, and communicate it to their members. In a similar vein the study on combating age barriers by the Dublin Foundation (Walker, 1997) concluded that at the workplace trade unions continue to face a dilemma, but also that there are national differences in the approach taken by unions.

It is argued that lifelong learning has become the new employment security objective on the agenda of trade unions, as ‘lifelong learning is becoming as important an entitlement for today’s employee as the right for a pension became in the past’ (ILO, 2003, p. 11). Box 14 shows how the European Trade Union Confederation (ETUC) has defined the framework of actions towards lifelong learning, relating it to the challenge of ageing population, among others.

**BOX 14. ETUC: Framework of actions for the lifelong learning development of competencies and qualifications** (Source: Tikkanen, forthcoming)

*A challenge:* The ageing population and the social expectations, which have resulted from higher levels of education of younger generations require a new way of approaching learning systems, ensuring that there are opportunities for all age groups - both women and men, skilled and unskilled - if significant increases in competencies and qualifications levels are to be achieved. Lifelong learning contributes to the development of an inclusive society and the promotion of equal opportunities.

*Four priorities:* The social partners assert the principle of shared responsibility of players with regard to four priorities and call for the intensification of dialogue and partnership at the appropriate levels. The social partners believe that the lifelong development of competencies depends on the implementation of the following four priorities:

1. identification and anticipation of competencies and qualifications needs;
2. recognition and validation of competencies and qualifications;
3. information, support and guidance;
4. resources.

European Trade Union Confederation (ETUC) <http://www.etuc.org/a/580>

The current approach of the unions to career extension among their oldest members is unfortunate because the unions are often in best possible situation to take up the issue of

learning and competence development with older workers (Stuart & Perrett, 2006). WORKTOW project showed that management does not consider it as their task to initiate discussion about the competence of and with their older workers (Tikkanen, Lahn, Withnall, et al. 2002). Also the formal training providers do rarely have direct access to promote learning participation of older learners. And as for older workers themselves, for various reasons they may be reluctant to bring up their learning needs, as discussed earlier, or may not even be aware of such needs in the first place.

However, at least two projects have been carried out with a major role for the union involvement and/or lead in them: the *Ageing and health on the continental shelf* project in the petroleum sector in Norway and the *Older workers in focus* project in Denmark. Also in these projects promoting of learning was only one aspect among several others. The projects showed that the unions' involvement could make a difference, but also that their participation does not automatically guarantee success for older worker involvement or in regards improving their situation. The *Ageing and health on the continental shelf* was a project initiated by the petroleum sector in Norway. This company-driven innovation project (2003-2006) aimed at retaining older workers until the statutory retirement age and to reduce sick leaves (Bakke & Lie, 2005; Lie, Tikkanen, Kjestveit, 2007). The project was carried out as a part of a large National Research Council programme in this sector. Most of the measures developed were related to health and safety and the physical working conditions on the oil rigs, and only rarely addressed the competence or motivation perspective. Older workers were mostly seen as competent enough to their work tasks. Companies participating in the study generally had a not very well developed learning culture.

The project *Older workers in focus* (Hansen & Nielsen, 2006) was carried out among low-skilled male workers Renoflex-Gruppen (a refuse collection company) and the state owned DSB S-tog (a company undertaking cleaning on the Danish State railways) in Denmark. The study showed that it is possible to identify models to maintain and integrate older workers by means of bottom-up approaches and with support from the unions. The following recommendations were made for the development of positive policies for older workers:

- (a) Management need to clarify their intentions from the start;
- (b) Optimum internal information must be available for all;
- (c) There must be support from all players at all levels in the company: employees, shop stewards, top management, middle management, and trade union representatives, etc.;
- (d) Information meetings for employees should be held in the workplace, to ensure a large turn-out;
- (e) Arranging a future scenario seminar early in the process is recommended, to give democratic anchorage to policy-making;
- (f) When implementing educational programmes, attention ought to be paid to the fact that older workers have a low level of motivation for education and that time should be set aside for talking about this;
- (g) The aim of an older workers policy should be both to recruit new older workers and to retain those already in the company;
- (h) Formulating a policy ought to be practice-oriented with usable, action-oriented statements and not just general declarations of intent;
- (i) Both the company's and the older workers' wishes and requirements must to be taken into account;

- (j) Real dialogue ought to commence when employees are about 50 years of age. This should entail discussion on the company's expectations of those employees who have been 10-20 years in the company. Colleagues of the employees should take part in this dialogue;
- (k) All parties should accept that it takes time to develop a policy for older workers. A thorough and comprehensive plan is necessary to achieve a result to the satisfaction of everybody: the company and the older workers themselves. (Hansen & Nielsen, 2006, pp. 145-146)

#### 4.4 Training of trainers in adult education

*“The personnel working for adult learning reflect the marginalized, diverse and fragmented character of the field. More effort is needed at all levels to identify needs and strengthen their professional development, but without insensitive standardisation.” (EAEA, 2006, 2)*

A good deal of analysis of teacher's work and the teacher profession has been carried out when it comes to education of children and young people by central organisations, such as, ILO, OECD, UNESCO. This work is related to the discussion about the quality of education (Box 15). However, such a quality discussion is still largely lacking from adult education – admittedly a much more colourful field of actors and provision than basic education and training. There clearly is a need for continuing education and training also among adult educators.

As suggested in the beginning of this report, the demographic change poses a challenge the competence of adult trainers. A good teacher to adults in general will most likely also be successful in facilitating the learning of older workers. The key question is what makes a good teacher? (Box 16) Recognizing one is relatively easy, defining what makes him or her such a good teacher is more difficult, let alone knowing how to produce one (Anderson, 2004; UNESCO, 2007). Subject knowledge and methodology for disseminating this knowledge – or facilitating adult learning – are central. The physical and social environment where teachers work is far from insignificant either (Anderson, 2004). Other characteristics found for a good teacher are analytical thinking, initiative, curiosity, a passion for learning, professionalism, confidence, trustworthiness, fairness and respect for others (UNESCO, 2007). It is increasingly recognized that induction and continuous training and professional development are essential to maintain high quality of teacher competence and learning outputs (UNESCO, 2007).

**BOX 15. The effectiveness of learning depending on the quality of teaching?**

For a number of years, it was thought that the teaching-learning process could be improved by taking partial measures, believed to be the most cost-efficient. Based on the results of research, it was thus decided that the best investment to improve learning would be to produce and distribute textbooks. Later, the emphasis was laid on ICT and school organization and management, and most recently attention has also been focused on assessment and schools standards to improve quality. Yet none of the above can be effective without the active support of teachers. The teacher acts as a mediator, and the effectiveness of innovations very much depends on the teacher making proper use of them. The teacher is at the epicenter of the learning process; and learning therefore depends first and foremost on the quality of the teacher. – UNESCO, 2007.



**BOX 16. Inquiry as a method to success in learning**

The key to ongoing improvement, in contrast to satisfaction to status quo, is inquiry; i.e. persistent questioning about how things are going and what could be done differently and better. (...) "Inquiry is the engine of vitality and self-renewal". (...) [T]he use of questions fundamentally changes the nature of the communication that occurs in the classroom. Through proper use of questions, didactic teaching becomes dialogue. Pedantic teaching becomes thoughtful discourse.

Inquiry has the same effect when applied to effective teaching. Asking questions about effective teaching is more useful than making pronouncements about it. Continuing to inquire about teacher effectiveness, whether as an individual teacher or an agency or ministry, is likely to promote the kind of research that is needed to help us better understand the making of an effective teacher. (Anderson, 2004)

As the partner survey later in this report shows, in most countries there is basically nothing available when it comes to the continuing development and training of adult educators. The case of older workers, as 'a new' potential target group, underlines the urgent need for developmental work in this area. Some practical, useful guidelines, although mostly as reminders, are provided in the training of trainers programme by the US Department of Labour (Box 17).

**BOX 17. US Department of Labour Training of Trainers' programme summary:****Principles of adult learning**

- Discover how adults learn
- Understand learners' preferred learning styles
- Create an environment that motivates and enables adults to learn
- Apply the learning cycle to all aspects of training design and delivery

**Designing training courses**

- Conduct a needs analysis
- Write measurable, observable, outcome-oriented training objectives
- Develop lesson plans

**Training strategies and techniques**

- Select the appropriate training medium and materials
- Use opening and closing activities
- Accommodate each participants' preferred learning style
- Maximize retention of training content

**Platform skills**

- Employ effective public speaking skills
- Learn to project confidence and enthusiasm
- Overcome the common problems of new instructors
- Develop your own natural style through practice
- Manage time effectively during instruction

**Evaluating learning**

- Understand the different levels of evaluation
- Use feedback to improve future training. (<http://www.bls.gov/itc/inttrnr.htm>)

## 4.5 Further issues and perspectives

### Gender

A gender bias has sometimes been observed in the adult participation patters. In Finland, for example, in voluntary, self-provided adult education most of the participants tend to be women, while majority of male participants are to be found from employer-paid training (Statistics Finland). However, there are big differences between European countries in both older women's participation in training and in the labour

market, and therefore also in their training needs. Also, while older males' (and females') participation rates in the labour market have declined, there are countries where women are only entering these markets (Pearson, 1990). For a lot of these, particularly older women part-time work is the only option, due to their low qualifications. More investment in accessible training options is needed in this area too. However, when it comes to organising training for older workers, to our knowledge, there is no systematic information available as to whether gender plays a significant role beyond general adult characteristics (e.g. in learning styles and preferences, women being more verbal than men, etc.) in it, and whether it therefore is a factor requiring specific attention.

### **Skills development, eLearning and the challenge of new technology**

The rapid development of technology has vastly altered the nature of work and the relationship of the worker to the product or service that is produced. While the consequences are notable to workers of all ages, it is the older workers who have a perspective to the times that were before, both as a reflection dimension through their own experiences, but also in terms of the practical consequences at their work - changes in tools, communication, access to knowledge and information, etc. and related competence requirements. In the 1990s it was estimated that 50% of the graduating engineer's knowledge will be obsolete within five years (Harootyan, 1990). However, the upskilling of jobs is not limited to professional and technological occupations. The development will also have a strong impact on job/occupational profiles. The recent Cedefop report on *Future skills needs in Europe* (2008) forecasted that there will be a total net employment increase in Europe of over 13 million jobs between 2006 and 2015 and almost all of them (12.5 million) will be at the highest qualification level (ISCED level 3 and 4), while there will be a parallel sharp decline in the jobs with no or low qualifications (ISCED levels 0 to 2). Taken further that the nature and skills (competence) requirements of the jobs will change and evolve, it is clear that (continuing) adult education and training sector is facing huge challenges, as is human resources development and the learning promotion in companies. The challenges are not least concerning the competence of professionals working in these fields.

Technology has brought both positive impacts (e.g. reducing the physical task demands, easier access to knowledge and learning opportunities, new job openings and potential for career mobility, distance work, etc.) and negative impacts (displacements, rapid devaluation of knowledge and skills, stress and cognitive pressure from continuous changes and learning demands, etc.) for older workers. Experience has shown, however, that while some older workers can be highly reserved in front of new technology, most of them learn to master these skills with appropriate training (Box 17). Rather than in older workers cognitive abilities, the challenge lies in the design of the new technology - user-friendliness, possibility adjust to physical impairments by age (e.g. vision), etc. – on one hand, and in the development of and access to appropriate training.

#### **BOX 18. Older workers can learn new technology**

“There is (...) little if any reason to assume that technological changes in the workplace are anathema to older workers.

Appropriate training, retraining, environmental enhancement, and other supportive interventions can ameliorate those problems that do occur for some older workers.” – Harootyan, 1990, p. 176.

However, many workplaces still have an age-exclusive learning culture, if any. In other words, older workers have not been included in ‘the learning drive’ in the workplaces – sometimes because of direct exclusion due to discriminative practices, sometimes because of management’s unrealistic expectations of self-direction, the learning skills and -preparedness of the older workers. On one hand, job-competence is a sensitive issue (also) for older workers to take up for an assessment. On the other hand, job tasks and prospects among low-educated workers often set very low learning demands and needs. In those situations, if changing of a job is not an option – and it often is not for an older worker – older workers may not see the value for the new skills and therefore choose not to participate. It is also true that governmental policy, social choices, corporate culture, and union agreement all form a complex equation, and the result may be less positive in regards middle-aged and older workers (Straka, 1990). Here again, it has been pointed out that the “success of older workers will be tied to initial educational level, and current and future education and training” (Sterns, 1990, p. 127).

## 5 Main findings from the TOP+ partner survey

Based on previous work on the theme of older workers and learning/training, we knew that what we could expect from the literature review was limited. A partner survey was carried out in order to get additional information about the topic. We wanted also to get access to possible literature available on the theme in languages other than English in TOP+ partner countries. Quotes from the responses from the partner are added in the text.

### 5.1 National framework for learning and training of older workers

*Providing possibilities for training is necessary but not sufficient alone to attract older workers to participate.* The survey showed that, even if to a varying degree, awareness is rising concerning the major changes in the demographic profile of the workforce, on one hand, and related to that, concerning the importance of including also the older workers in the world of lifelong learning. None of the countries had a specific national framework for learning and training of older workers, even if lifelong learning policy was in place. In best cases general adult education framework was well developed, and under there the issue of older workers and their learning needs and possibilities explicitly stated (Sweden). The latter was also the case in Norway, although the field of adult education is highly fragmented and the provision not very well developed. Also, the EU instruments towards the goals in the Lisbon process have had an influence in the Member States. There were countries in which funding for learning participation was available – through, for example, *the Community Initiative EQUAL* and *ESF* – without a national framework. The responses suggest, however, that these programmes have not been very successful in attracting older workers in participating in training. Questions also remain concerning the long term impacts of the training provided. It also seems to be common across countries that older workers themselves are very rarely active in requesting for more or better training opportunities.

When it comes to money flows in adult education, the report from Germany shows that funding has been primarily made available for individuals and in some cases to companies to buy suitable, typically tailor-made training, or through tax refunds, rather than investing in the development of adult education as a part of the national education system. This has resulted in flourishing of private training and consultancy markets and increasing competition and shrinking of the frames for functioning of the public adult education. This situation is familiar also in other countries. Indeed, workplaces have become recognised as a central learning arena – preferred by younger and older adults alike. Public adult education providers seem still to struggle with these changed realities and with redefining their own field of action and role in workplace learning. An observation is nevertheless that the public adult education sector is increasingly focusing on providing

**GERMANY** “By the threatening discontinuation of public finances many of the 17.000 educational institutions in Germany have changed their profile to the point of coaching and training for companies. More and more institutions are exposed to the higher competition for projects, commissions and individual learners.”  
(Deutsches Institut für Erwachsenenbildung: Trends der Weiterbildung - DIE-Trend-analyse, Bielefeld 2008), Kurzfassung in: <http://idw-online.de/pages/de/news254253> )

basic skills training (literacy), as well as on information and guidance, outreach activities, and assessment and recognition of prior learning.

*National learning cultures: older workers still in the margin – if not completely outsiders.* TOP+ partners describe their countries as ‘learning societies’ through implementation of lifelong learning, albeit in a varying degree. However, in most countries lifelong learning seems to repeat the definition of adult learner, which adult education did in the 1990s: referring to persons up to around 40 years of age and relatively well educated (Tikkanen, forthcoming A). Older workers have gained much attention in working life in many countries, particularly in large companies and in public sector. However, the discussion has been focused on postponing retirement by a few years through job-related arrangements (flexibility, different/lighter tasks, more leisure, etc.) and on (physical) work ability. Psycho-social (including cognitive) aspects of working have gained much less attention. Besides different age/career perspectives, lifelong learning is being interpreted differently in terms of its contents.

*“LLL is mostly discussed in the context of gainful employment. The trend is: working longer (lifetime) and taking into account the specific changes of ageing workforce. Learning processes then do not refer to the production process but to questions of health for example” (Germany).*

Rather than competence development, initiatives targeted directly to employment opportunities among older workers seem to be more common, particularly employment training for the unemployed or those in risk.

Overall the country reports show that the concept ‘older workers’ seems to be understood within a very short-term perspective, referring to workers near their age of eligibility to retirement or early exit options. Then it is perhaps not surprising that in many cases older workers choose to leave early rather than to take training and build their capabilities – and find a new workplace. However, there are still countries where ‘older worker’ is not an issue, definitely not in the context of learning/training, and where references to ‘older’ persons are made in connotation to old adults outside active working life (Poland, Romania)<sup>5</sup>. The issue of ‘older workers’ often becomes a matter for social security sector rather than for education or labour administration. However, international overviews (e.g. EC 2006c; OECD, 2006) point to the importance of both adopting a cross-administrative perspective to older workers’ issue and to specifically address their learning needs and situation under the overall lifelong learning policies.

**POLAND:** “Social partners are potentially able to play an important role in discussion on training system for older adults. At present they are neither spokespersons nor a serious hindrance of the education system development. This situation is caused mainly by the unsatisfactory representation: main employers’ organizations are still very young; also on the other side, two main trade unions noted a severe decline in number of members in the 90s. Now about 15% of workers are unionized. The government tries to increase the social activities by introducing a programme *Fund of Civil Initiatives* which supports stimulation and reinforcement of civil initiatives with participation of the sector of Non Governmental Organizations (NGOs) using existing solutions and practices. In 2008 the programme takes into consideration senior’s social activation and integration.”

*Social partners - a very low profile when it comes to promoting learning for older workers.* The role the social partners play in the issue of learning and training of and for older workers varies between countries, but is generally very modest or non-existent.

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<sup>5</sup> Retirement preparation training seems to be the only form for organised learning for these older people, if any.

However, in most countries they already strongly promote the concept of lifelong learning. When it comes to their practical contributions focus seems to be in issues directly related to employment and in the context of workplaces, rather than in formal training and competence development, or in building the public education system for adults. “[T]he employers’ organisations are seeing the opportunities of training (...) The effect of their interest in training is more visible as training services providers, than as commitment to improve the national training framework. As for “older workers”, no specific activities are visible, except for the legislation against discrimination at workplace (formally, legislation is aligned with the EU level, even if law enforcement is weak).” (Romania)

However, social partners are active in promoting of and providing training in general in some countries (Norway, Sweden), but still quiet when it comes to older workers’ learning and extended careers. There usually are no collective agreements on a sectoral level concerning older workers, but company level examples can be found (Germany: Telecom and the examples described earlier in this report - see chapter 4.3.3). However, Germany seem to be making progress on a level of awareness raising towards the need for sectoral agreements (e.g. *Arbeid und Leben* project provides work-life balance conferences, a demography initiative in North Rhine-Westphalia targeted to HR-managers and works councils).

**SWEDEN:** “[T]he employers are supposed to provide the employees with the specific training needed to perform the job. Employer sponsored training is to a large extent organized at the work place but employers also buy training from public and private providers. Some collective agreements contain explicit clauses regarding training at work. (...) More and more collective agreements make at least some reference to skill development at work. A first step may be the recognition of the importance of learning at work. A second step can be to recommend a dialogue between employers and employees at local levels about individual skill development. A third step is to agree to workplace-based skill assessments, and skill development plans and follow-ups. A fourth step is to agree to quantitative targets for learning opportunities for workplaces or individuals at given workplaces.” (Solheim, 1999, p.2)  
- *The system of work-related learning is rather similar in Norway.*

## 5.2 Key-issues concerning lifelong learning and older workers

In the second part of the survey we requested about the key issues in the TOP+ countries in regards lifelong learning in general, adult education as a part of lifelong learning, and older workers’ situation. The findings summarised in table 5. The table shows that there is a good deal of variety between countries and general patterns are not easy to observe. However, the issues as such are largely familiar in the European discussion of lifelong learning and older workers as show in the literature review earlier in this report. The survey shows a difference in emphasis between the countries in this discussion depending on the maturity degree of the discussion and policies, rather than being about completely different issues.

Table 5. Key issues concerning lifelong learning (LLL), adult education (AE) and older workers

Key issues concerning lifelong learning and adult education	Greece	Germany	Romania	Poland	Belgium	Cyprus	Sweden	Norway
<b>Policy</b>								
Demographic change		X						
Mobility		X						
Employability as inclusion		XO	X	XO				O
Disadvantaged groups			X				X	X
Drop-out								X
Multiculturalism, integration of immigrants						X	X	X
<b>Education system</b>								
Basic education (literacy)	X					X		X
Development of Continuing Education	X							X
Equal Access & Opportunities			X	X				
Funding			X	X				
LLL as a homogenous/coherent learning pathway							X	X
<b>Guidance and counselling</b>		X		X				
<b>Learning attitudes</b>	O	X		O	X		O	
<b>Participation</b>	XO	X	X	X				
Gender issue		X				X		
Learning needs	O	X		X				
Accumulation of participation				X				
<b>Education and Training Practice</b>								
Open and distance learning	X							
e-Learning, ICT		X				O	X	X
Media competence		X						
Foreign languages		X				X		
Social and cultural issues	X							
Adjustment to individual learning needs		X						
Integrated vs. segregated provision for seniors		X		X				
<b>Quality of education and training</b>								
Teacher training in adult education for older	X							
Quality of training provision			X	X				X
<b>Informal learning</b>				X				
Quality of learning outcomes			X	X	X			X
Accreditation, recognition, validation			X					
Experience-based learning		X						
<b>Human Resources</b>								
Skills and competences in and for working life			O	X				X
Cooperation and partnerships with companies				X				X
Role of social partners							X	
Ageing workforce		XO	O					
<b>Additional key issues concerning older workers</b>								
HSE (Health, safety and environment)		O						O
Social security, flexicurity, retirement		O				O		
Unemployment, social exclusion				O			O	
Retention			O	O				O
HR - Intergenerational projects, age-mixed teams		O						
Change resistance, fear of new technology				O				
Low self-esteem and self-confidence				O			O	
Lack of realistic knowledge about ageing/at work				O				
Work-life balance		O				O		O
Low-education			O	O				

Note: 'o' means that an issue listed is mentioned as important particularly in regards older workers. 'x' refers to an issue important in general in AE and LLL.

### 5.3 Learning possibilities available for older workers

Table 6 summarises the various learning opportunities, which were mentioned by partners as being available for older workers in their countries. We had asked questions in regards formal training and informal learning opportunities as well as possibilities for workplace learning. In regards the latter, we were interested in employers' attitudes towards learning in general and towards older workers' learning in particular.

Table 6. Learning possibilities available for older workers

Learning possibilities available for older workers	Greece	Germany	Romania	Poland	Belgium	Cyprus	Sweden	Norway
<b>Formal training providers</b>			Na	Na				
Vocational Training Centres (short courses, certificates)	X							
Local Adult Education Centres (e.g. Volkhochschulen)		x				x	x	x
Religious organisations		x						
Other public or private training institutions					x			
'Third Age Universities' (U3A) (*				x				
Universities (open uni or continuing education centres)						x	x	
Formal HRD course providers						x		
<b>Informal training providers/opportunities</b>			Na					
Learning in the workplace	x						x	x
Self-studies	x						x	x
Internet, e-Learning		x		x	x		x	x
Study groups/circles		x					x	x
Trade unions		x						
Voluntary organisations		x						
Libraries				x	x			
Religious organisations				x				
Associations and other organisations (e.g. foundations)				x		x	x	
Consultants					x		x	x
Networks					x		x	x
<b>Workplace learning opportunities and forms</b>			Na					
Provided by large companies	x			x			x	x
Provided by SMEs							x	x
Provided by trade unions						x	x	
Company participation in development projects							x	x
In-house seminars, study groups		x						
Learning related to introducing of new technology		x					x	x
Mentoring		x					x	x
HRD general						x	x	x

Na = No specific provision of learning opportunities for older workers; (\* U3A typically only provide training to older people who have left active working life.

The first observation which we can make from table 6 is that older workers are in fact provided a wide range of learning opportunities by a various providers! In fact, so much so that the low participation rates generally reported sound surprising. However, even if it would sound natural that all countries would provide their older workers the common learning opportunities listed under the formal providers, it appears that these are quite strongly country related. In other words, some of the formal opportunities and providers listed present single cases by one country. An example is trade unions: only Germany has mentioned that they provide training for their older members. While provision of courses by trade unions is common also in other countries, they do not target specifically at older workers. However, when it comes to informal learning and learning



at the workplace, there is more commonality between the countries in regards various opportunities (Table 5).

## 5.4 Competence and competence development of the teachers of older adults

The questions concerning the competence and competence development of the teachers of older adults covered the following four perspectives:

1. Teacher training in adult education (AE) - *Educational background of the teachers of adults?*
2. Continuing education and training (CET) for teachers in adult education?
3. Special competence on teaching older learners?
4. Training *about* older people in general?

The answers for each of these areas are shown separately in tables 7 – 10. As expected on one hand, the answers varied a good deal, and on the other, in most countries there was relatively little systematic to report from in particular concerning the perspectives 2-4 above. The following general commentary to this section from Belgium is descriptive also more generally:

*Mostly an individual approach, an individual interest in the situation. Trainers will train themselves by reading, attending workshops, belonging to networks, attending seminars...*

We make here only some brief observations on the partner responses: Educational background of adult educators appeared to be very different in the partner countries, also within a country (Table 7). Countries like Poland (also e.g. Finland outside this study), where adult education seems a well established study in higher education, adult educators have likely somewhat more homogeneous training background than countries where adult education is not provided in higher education. The situation is even less developed – and generally poorly developed, with the exception of Poland – in regards continuing education and training for adult educators (Table 8). Also, when it comes to special training provision for competence development on teaching older learners, there is hardly any formal training available (Table 9). Poland lists a range of train-a-trainers approaches, but these seem to be more targeted to adult educators in general rather than specifically building training competence in regards older workers/learners. The responses to the question about training about older people in general show that, even if pedagogical (geragogical) perspectives in regards learning promotion among older workers are poorly developed, the countries have nevertheless developed a good deal of supporting training on ageing to various professionals working with older people (Table 10). In fact, a survey was recently carried out in the Nordic countries on university-level training in the various fields of gerontology. The results were presented in the 19<sup>th</sup> Nordic Congress on Gerontology in May 2008<sup>6</sup>

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6 <http://tsforum.event123.no/ngf/19nkg/programm1.cfm> - see Heikkinen, E. & Andersen, L. *Gerontology in Higher Education* and Parkatti T; Hietanen H; Lyyra T-M: *Gerontology in higher education in the Nordic countries*.

Table 7. Teacher training in adult education (AE)

**Greece:**

The National Accreditation Centre for Continuing Vocational Training maintains a system for the accreditation of teachers of adults. The background of teachers differs according to the training area. This same centre also supervises programs for training the teachers. The content and duration of programs is defined each time by the Board of Directors of the Centre. The first programs offered by Centres for Vocational Training had a duration of 300 hours.

**Germany:**

1. Anything goes (formal, non-formal, blessed by nature); Very different backgrounds
2. 1350 employees (185.000 permanent employees, 996.000 freelancer, 130.000 volunteers)
3. In adult education work a lot of teachers, a lot of people with university graduation, people with additional skills or other Professionals.
4. Universities offer additional skills for people working in adult education
5. In-house trainings of the training providers; offers of organisations working in this field: national or regional organisations of the Volkshochschulen or Family Education Centres; for example the expert programmes of the Volkshochschulen: Basic qualification for adult education
6. Standardisation and orientation towards certification is a growing sector in the context of quality management in continuing education
7. training providers: private 8876 (47,2 %), associations 3757 (20 %), under public law 1505 (8 %), employers associations und chambers 1453 (7,8 %), churchly 1268 (6,7 %), community education centres (Volkshochschulen) 987 (5,3 %), others (universities etc.) etc.) 455 (2,4 %), unionised 281 (1,5 %), others/foundations 207 (1,1 %). In addition there are in-house education centres of companies and institutions whose main task is not especially education: publishing houses, consultancies, libraries, museums and other associations

**Romania:**

The law for adult training specifies that all adult trainers should have the competences described by the occupational standard for trainers, either by participating to an accredited train for trainers course, or by assessing own competences in an accredited assessment centre. Teachers also should take the same pathway for working with adults.

No special requirements exist for non-accredited courses (usually short term in-house courses).

**Poland:**

According to the National In-Service Teacher Training Centre Report *Teachers in September 2006* the most popular form of teachers formal education were postgraduate, two semester studies (about 26 thousand teachers, i.e. 42.8 % of all trained teachers). Other types of formal qualifying courses were attended by 18.5 thousand teachers (30.2 % of all trained). Fewer people were involved in Teachers Training Colleges (0.5%) and Teachers Training Colleges of Foreign Languages (1.75%)

Main institutions providing training for teachers:

- The National In-Service Teachers Training Centre supported by 58 Regional Teachers Training Centres,
- Postgraduate studies,
- Teachers Training Colleges.

Other initiatives supporting training for teachers: Programme Grundtvig (Lifelong Learning Programme):

- improvement of skills and mobility of teachers participating in education of adult people in order to support mobility at least of 7000 persons a year until the end 2013,
- creation of the access to education for adult people from groups requiring special support and from socially handicapped groups, in particular for older persons and persons who gave up training without achievement of qualifications,
- improvement of teaching methods as well as organization and management of adult's training.

Academic Andragogy Association supports adults education by:

- organizing studies, lectures, seminars, conferences and surveys on education of adults,
- counselling in the discipline of education of adult people,
- encouraging performance of examinations on andragogy in Poland and other countries,
- publishing "Adult Education Quarterly", "Andragogic Annuals", and "Adult Education

Library” Series.

The Polish Academy of Sciences – a state scientific institution comprising the Committee of Pedagogical Sciences which is the self-governing representation of pedagogical sciences, serving for integrating scholars from the whole of country, includes a team of experts on andragogy.

**Belgium:**

Most of the time, they trained themselves or showed interest in training others while they were working within a company. Universities will train teachers to teach to young people.

**Cyprus:** Most adult education teachers are primary or secondary education teachers There are also others who are subject specialist working mainly in non formal education.

The training of the trainers is of short period ,in seminar of 1-2 days and it is organised by the providers of the programmes. There is no any national training institution specialized for training seminars.

**Sweden:** Examination from formal education teachers training programmes.

**Norway:** All kinds of educational backgrounds, depending on one’s interests.

Availability of adult trainers with solid knowledge and skills on adult education theory and practice is a key challenge in the society. The situation is different (less positive) from the other Nordic countries, since until this year, Norway has not had adult education as an independent field in higher education. Competence of teachers to facilitate learning among older adults is in even a worse shape. The Norwegian educational markets are not well developed to facilitate upskilling of the trainers in adult education.

Table 8. Continuing education and training (CET) for teachers in adult education - *Is there a national framework for CET of trainers (training of trainers) in adult and professional education? What are the main formal ways of CET for teachers in adult education, if any?*

**Greece:** The training programs are defined by the National Accreditation Centre for Continuing Vocational Training. They are offered as a combination of self-learning – distance training and classroom training. In order to remain accredited, a trainer has to certify 150 training hours of adults every 5 years.

**Germany:** Not available. There are offers as in-service training / during, for example at universities for the training of adults, but participation is voluntary.

**Romania:** Not developed. For teachers in the educational system, their occupational code specifies certain requirements for continuous learning, used mainly for promotion and acceding to higher payment levels.

**Poland:**

National Centre for Supporting Vocational and Continuing Education (a central, public, national-level institution providing professional development services for teachers with cooperation with the Ministry of National Education and Science). The mission of the Centre is defined as to:

- inspire, prepare and coordinate activities related to professional development of teachers from vocational schools and schools for adults,
- prepare and execute educational ventures related to the stages of educational transformation in Poland,
- cooperate with other central government and educational institutions as well as non-government organizations from Poland and abroad,
- collect, process and disseminate pedagogical information related to vocational and continuing education.

**Belgium:** Not known.

**Cyprus:** Some seminars are taking place for the tutors in adult education. There is no any professional training course for teachers in adult education. There is in service training for tutors in some cases.

**Sweden:** Not available, but being prepared. STPKC is one of the developers of such.

**Norway:** There is no specific CET available for teachers in AE. Those in adult teacher profession can only get more training by participating in the ordinary provision of other parts of AE.

**Table 9. Special competence on teaching older learners. - Does (basic) teacher training in AE provide modules to prepare for working with older learners? Is there train-the-trainers CET courses/modules available on how to promote learning among older learners?**

**Greece:** No generic framework available. Few funded projects may have tackled the issue, but there are no general regulations or procedures on national level.

**Germany:** Not systematically but ad hoc and related to projects, short time training on the job

**Romania:** Not developed.

**Poland:** Different courses of train-the-trainers are available, for example:

Train the trainer – *acquiring of specialised training skills to teach adult people like: teaching by simulations, workshops skills, role and scenes playing exercises, etc. Participants get:*

- the diagnosis of training needs, the knowledge how to teach adult people,
- the ability to conduct independent trainings in various forms, with adult students' active participation and to manage various types of group behaviours.

Workshops on the competences of adults' teachers (andragogs):

- professional profile of the teacher of adult people,
- tasks and functions andragogs,
- principles and the methods of adults training.

Activities in the CAERA Programme (a part of Socrates Programme):

- identification of groups' trainers & trainees,
- training curriculum for rural communities,
- Training of Trainers.

A course on *Specificity of Teaching of Adult People:*

- lifelong learning in the educational policy of European Union,
- specificity of teaching/learning adult people,
- dynamics of work in the group of adult people,
- active participation methods in educating adult people,
- organization of the process of persistent education.

Training of Trainers (TOT) courses include:

- introduction to the issue of training,
- the analysis of training needs,
- formulating training purposes,
- styles of learning and teaching,
- preparing to train,
- training technologies,
- the case studies
- the trainers' skills,
- work with groups,
- consulting and final evaluation of training.

Business courses designed for planning and organising trainings addressed to workers of departments of trainings, persons responsible for planning trainings in the company, internal coaches, etc.:

- methods of the analysis of training needs,
- development of the ability to plan trainings for the company,

increasing efficiency of trainings by creating projects based on proper methods for adult people training and/or education.

**Belgium:** Not known. But could be.

**Cyprus:** No training modules to train teachers to work with older adults.

**Sweden:** Not as a special competence, at the moment.

**Norway:** Not available.

Table 10. Training about older people in general - *Do other vocational and/or professional training institutes provide degree programmes or courses/modules on how to address the target group of older people in their work (e.g. health care or other service sector personnel)?*

**Greece:** Yes, for healthcare personnel, emergency personnel, daily activities support personnel, rehabilitation personnel.

**Germany:** Seminars for older workers in companies (for ex. Evonik/Ruhrkohle – preparation for the time of retirement) can't be executed, because they do not find any participants.

A problem is that a lot of education offers take place in the welfare policy and not in the area of organized education. The training providers offer seminars for consumers / seniors, in the area of welfare policy education for senior bureaus or similar is offered. This is tied to structures of welfare and with that a completely new scene is arranged. National programmes are „EFI“, „MoQua“ or „Alter schafft Neues“. Education is organized but not necessarily by training providers.

The topic is involved in degree programmes for special target groups, who work with older people, for ex. In the field of social pedagogy (when working with older people) or in the field of pedagogy. There participation is always by free choice and never obligatory. Example is the Fachhochschule (university of applied sciences) Fechta with its institute for Gerontology.

**Romania:** Not developed

**Poland:** There exists system of postgraduate, two semester, university level studies designed for trainers willing to improve skills and ability to work with older people, for example:

- Care of Older Persons – course (postgraduate studies) for the professionals providing aid for old people having difficulty in independent functioning,
- Care of Older and Handicapped Persons – course (postgraduate studies), designed for preparation of professional caretakers' for posts in the health and social service. The studies are composed of medical, psychological and legal thematic blocks. Special attention is paid to prevention and therapy of somatic and mental diseases among older persons.

Social Gerontology – studies dealing with psychology of ageing, sociology of old age, social policy, geriatric care, social inclusion, forms and methods of working with older persons.

**Belgium:** Not known.

**Cyprus:** The Human Resource Development Authority is working with international institutions for training modules to assist teachers working with adults in general including older adults.

Health services and welfare services organises seminar for their personnel to work with older adults more effectively.

**Sweden:** The New Start Centre provides mentor-training courses, developed in the Life Competence 50+ project. The purpose of the course is to inspire others and also help older jobseekers to develop into mentors for people who have recently started companies.

**Norway:** Generally not. This kind of training is only available as a part of gerontology studies within medicine and health and as social gerontology for social service workers. But the contents do not address the how-to-do in regards teaching or learning of older adults.

## 5.5 Learning needs and informal lifelong learning among the teachers of older adults

Next we were hoping to find out about the learning needs, informal learning, which the teachers of older adults would participate in or prefer, and about the existence of training course or modules providing special competence on how to teach/facilitate learning among older learners. The results are summarised in table 11. Not unexpectedly, there is no systematic knowledge on these issues available. Informal learning is very much depending on the individual teacher and his or her motivation and activity to find settings and sources for such learning. The context for such learning can be adult educator's work or outside of it (e.g. libraries, internet), participation in multi-

partner collaboration projects (e.g. EU-projects) or private settings (programmes, groups, courses, etc.). Furthermore, the findings in table 11 shows that there is no systematic knowledge on the learning needs among adult educators, nor is there any formal framework for continuing education and training (CET) of adult educators. The

Table 11. Learning needs and informal lifelong learning among the teachers of older adults

<p><b>5.1 Informal learning undertaken by teachers in adult education</b></p> <p><u>Greece</u>: In the framework of the EU programme LdV, Elderly care vocations lessons have already be given by teachers to adults trainers.</p> <p><u>Germany</u>: No.</p> <p><u>Romania</u>: Usually informal meetings, group discussions, experience exchange, international projects</p> <p><u>Poland</u>: Main learning methods by teachers in adult education are individual studies supported by: internet (including e-learning), libraries, and commercial training offers.</p> <p><u>Belgium</u>: No system. Single examples. E.g. Skype or internet courses given by people in other countries. U.S. and Canada are certainly far ahead in that matter with a philosophy that nobody should stop working one way or another.</p> <p><u>Cyprus</u>: Mainly older adults can get support in participating in education from the adult education centres by the Ministry of Education and Culture. Every year more that 2000 learners aged 55+ take part in many activities at the adult centres. Those over 65 participate free of charge.</p> <p><u>Sweden</u>: STPKC is providing and developing such tools.</p> <p><u>Norway</u>: No systematic information available.</p>
<p><b>5.2 Learning needs among teachers in adult education: A national framework for CET of trainers?</b></p> <p><u>Greece</u>: -</p> <p><u>Germany</u>: Not available. Some projects or regional working teams exist. “Eurotrainer“ (EU &amp; BIBB) on-going study on work and education/training of the trainers, incl. also those working in in-house training in companies.</p> <p><u>Romania</u>: No. Several trainers’ associations have been formed, but haven’t managed to group the majority and to create an accepted definition of trainer’s proficiency.</p> <p><u>Poland</u>: The National In-Service Teacher Training Centre (an agency of the Ministry of National Education and Sport), supports the development of a national system of teacher training.</p> <p><u>Belgium</u>: Not known.</p> <p><u>Cyprus</u>: Not available.</p> <p><u>Sweden</u>: A tool for EQF-based assessments is being developed by STPKC.</p> <p><u>Norway</u>: Not available.</p>
<p><b>5.3 Special competence on teaching older learners. Training courses/modules available for adult educators on how to promote learning among older learners?</b></p> <p><u>Greece</u>: At the Hellenic Open University of Patra, Greece, there is a master degree in Adult Education</p> <p><u>Germany</u>: Some attempts been made but nothing is structured or coordinated; one main problem is the division between welfare and education resources in national and regional government: “Aging” and “Education” do not belong together and are not linked.</p> <p><u>Romania</u>: No.</p> <p><u>Poland</u>: Pedagogy studies include courses on working with older learners. Andragogy postgraduate studies are directed to these persons who are interested in educational support of adults’ development. They prepare for learning adult people in educational institutions, workplaces, local communities, etc. The graduates obtain knowledge of the andragogy theory, adult psychology, organization and management of educational processes, adults’ counselling, creating the policy of lifelong learning.</p> <p><u>Belgium</u>: Not known.</p> <p><u>Cyprus</u>: No special competence on teaching older adults. An EU project, in which Cyprus is participating, is working on competences for teachers working with older adults.</p> <p><u>Sweden</u>: Not to the extent needed.</p> <p><u>Norway</u>: Not available. Taken that the general AE and CET there is poorly developed, the situation is still worse when it comes to the specific competence needs in regard older workers’ learning and support for it.</p>

answer from Poland suggest that they might have some offers in this line, but the answer is not quite specific on this. Also, the partner from Sweden (STPKC) reports that they are participating in a tool development for EQF-based assessments. Again, the answer is not precise enough to say whether this work would result in a national level frame for CET of adult educators. Finally when it comes to courses for special competence on how to teach adults, there is very little available in the countries who answered the survey. However, again Poland seems to be an exception with relevant modules available within studies in adult education ('andragogy'). Sweden also implies that this kind of training is available, although not to the extent needed. At the same time this answer implies that there is an awareness of a need for this kind of knowledge among adult educators (adult education is an independent field of study in about three universities in Sweden).

## **5.6 Monitoring of older workers' participation in adult learning**

The responses from the TOP+ partner countries show that they are participating in joint European monitoring of participation in adult education. Mostly the monitoring is carried out on the level of general adult education. In these surveys age is typically given a role of a background variable, which can be used to find out about the situation in particular age groups, such as for example older workers (provided that information about participation can be combined with information about employment). However, it is very seldom that these kinds of analyses are being carried out and reported as a part of the main report. As a result we still know relatively little about older workers as learners, their learning needs, and how do they experience workplaces as arenas for learning. However, taken the active discussion about the situation of older workers and the Lisbon process, this situation may change when the results of the third vocational training survey (CVT3) and the next adult education survey will be released. All the countries which responded to the TOP+ survey are also participating the CVT3.

## **5.7 Best and worst practice of lifelong learning initiatives targeted to older workers**

The best practices presented in the TOP+ partner reports are listed in table 12 for formal training and in table 13 for informal training. The different situation in the TOP+ countries was also evident in these cases. Some countries were able to list several examples while some none, and others in between. Under formal training (Table 11) various cases have been described: retraining of consultants to work with older worker issues, retraining of retired employees to work in their former companies, training to older workers to cope better with particular work characteristics (e.g. shift work, Germany), individual training for individual training needs financed under a governmental programme (Poland), and training in IT (Norway, Poland, Sweden). The cases described vary a lot in terms of their size, from (elements under) national programmes to single courses in a particular subject. Besides some courses on IT, all training in fact seems to combine formal and informal learning. As we have seen in the literature review, such a combination can be a very effective way of learning. This type of learning is also often experienced as more motivating among older workers than purely formal and or theoretical courses. When it comes to informal learning (Table 12),

Table 12. Best practices in formal training targeted to older workers

<p>1. <u>Retraining of consultants</u> working to research project management area using multimedia tools and structured workshops. Performed by CERTH within the framework of CREDIT / GRUNDTVIG project. Provide easy to understand material for future reference and better memorisation. Coaching of workers to inside tips of the profession, so that they can be competitive in the job market. Provides career consulting and indicates opportunities and threads of every area of the profession. (Greece)</p> <p>2. <u>AGE and MoQua Combination</u>: AGE promotes <u>social engagement by people in retirement in cooperation with their former companies</u>. In action groups they work for social and public needs. MoQua is a qualification program for older people working as volunteers. Success factors: 1. direct connection between subjects of learning and engagement in own projects; 2. learning in small groups of people knowing each other from own projects; 3. recognizing the needs of older people in learning. (Germany) Projekt AGE: <a href="http://www.aulnrw.de/index.php?id=276">http://www.aulnrw.de/index.php?id=276</a> Projekt MoQua: <a href="http://www.moqua.arbeitundleben.de/start.htm">http://www.moqua.arbeitundleben.de/start.htm</a></p> <p>3. <u>KEB 40 plus</u> (nationwide project with a sub-project in) Northrhine-Westfalia NRW, „<u>Getting older in a healthy way in alternate shift</u>“ (Gesund älter werden bei Wechselschicht)</p> <ul style="list-style-type: none"> <li>• Two-day seminars with the topics: Health, how to deal with stress, nutrition etc. for all workers in alternate shifts of a steel company (steel workers, continuous casting, melting plants).</li> <li>• Topic “health”</li> <li>• Setting of the seminars is harmonized with the working conditions of team in alternate shifts (Contischicht) regarding topics, time and duration, and methodology (whole team, intergenerational learning)</li> <li>• High personal benefit, chance to implement when being in alternate shift</li> <li>• Attractive place for learning, adequate to the topic (esteem). (Germany)</li> </ul> <p>4. <u>GO – the offensive for generations 2005</u>, a project at Salzgitter AG. (Germany) <a href="http://www.exabis.com/cm362/fileadmin/wage/pdf/Lompe_25_10_07.pdf">http://www.exabis.com/cm362/fileadmin/wage/pdf/Lompe_25_10_07.pdf</a></p> <p>5. <u>MAYDAY</u> – active supporting of workers' and companies' development during structural changes in the economy:</p> <ul style="list-style-type: none"> <li>• <u>facilitation of the adaptation of workers 50+ in turbulent labour market</u> conditions and maintaining their professional activity for further years instead of retirement,</li> <li>• <u>training in IT</u> for workers with long employment record,</li> <li>• prevention from exclusion from labour market because of ignorance of new technologies. (Poland)</li> </ul> <p>6. <u>TIME FOR WORK – WORK ON TIME</u> – eliminating obstacles in the SME sector to provide temporary employment to older persons aged 45+:</p> <ul style="list-style-type: none"> <li>• deals with the social groups with the highest ratio of long-term unemployment and the longest job-seeking time,</li> <li>• prevents discrimination of older persons in the labour market, designs and organises training for older persons discriminated in the labour market. (Poland)</li> <li>• identifies posts which meet the requirements of both the beneficiaries and the entrepreneurs.</li> </ul> <p>7. <u>Governmental PROGRAMME 50+ for older persons' professional activation</u>:</p> <ul style="list-style-type: none"> <li>• financing the post-graduate education with the financial means of the governmental <i>Labour Fund</i>; persons in training will receive the amount of two average payments to cover the costs of education,</li> <li>• the workers 45+ will individually choose the training in which they want to participate, independently from potential employer and labour agency,</li> <li>• covering up to 80% of expenses on older workers trainings from <i>Labour Fund</i> for companies which created the training fund and provide courses for their employees. (Poland)</li> </ul> <p>8. Telecommunication Authority of Cyprus, <u>Pre retirement course</u>: 3 days, innovative, well structured, cooperative. (Cyprus)</p> <p>9. ElderNEt (Sweden)</p> <p>10. <u>ICT-training to older workers</u>. (Sweden)</p> <p>11. <u>Coop Bergen</u>: All (manual) storage workers in a regional retail delivery point, many of them aged 60+ and with low education, were included in digitalising the whole storage system. As a result everybody developed their skills in data very successfully. Successfully repeated some years later. (Norway)</p>
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learning activities such as mentoring, ICT-related learning, various on-the-job courses, and retirement preparation are mentioned.

We also asked about the worst practices in regards both formal and informal learning. It appears that these kind of examples are perhaps fastest forgotten rather than reported for others to learn from. In a telephone interview the director of the Centre for Senior Policy in Norway – a person with the best overview to the field of older workers in Norway and with a very good command of the situation in Europe more broadly – confirmed that (i) there are very few cases/projects where formal training would have played a significant role in projects focused on older workers, (ii) the most activity in regards learning, seems to take place in relation to computer skills, and finally (ICT), in his opinion, also the worst cases to be found are related to this area.

Table 13. Best practice in (informal) workplace learning projects targeted to older workers

<p>1. <i>Mentoring</i> (Coaching for ex. For women, migrants, intergenerational, senior expert service SES and so on). All are volunteers. No standardised premises for entering the programmes as a trainer or counsellor. (Germany)</p> <p>2. <i>ICT/Education for seniors</i> is supported by the universities of Ulm and Erlangen, who support the senior networks (VILE and bayr. Seniorennetzwerk) / Bavarian senior network. (Germany)</p> <p>3. <i>ON-THE-JOB-TRAINING</i> offered by large companies like Coca-Cola, Procter &amp; Gamble or Unilever.</p> <ul style="list-style-type: none"> <li>• courses supplementary to the traditional training offer,</li> <li>• employees execute their duties and raise qualifications at the same time (on-the-job-training),</li> <li>• fast development of skills due to immediate, practical verification of knowledge, skills and abilities in the direct application. (Poland)</li> </ul> <p>4. <i>DISTANCE LEARNING</i> and education over internet, with the use of e-learning techniques, offered, for example, by the Polish Virtual University):</p> <ul style="list-style-type: none"> <li>• study programmes and additional, specialization courses,</li> <li>• support of traditional lectures and trainings,</li> <li>• promotion of modern teaching methods. (Poland)</li> </ul> <p>5. <i>Too young too retire</i>. U.S. program given by Howard Stone. 6 hours by phone. International network. Interesting because he helps interested people to gain self confidence, think about themselves as a positive, unique person capable of being helpful to society. Easy to follow: reading material not expensive and experimental. Easy because the only thing needed is a phone or a computer and Skype. Interesting because it combines a marketing approach and a personal, psychological approach and support. (Belgium)</p> <p>6. Participation in the adult education centres: mass participation, social change by older adults, older adults back to schools, active for life (Cyprus)</p>
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## 6 Planning education and training for older workers: A matrix

This chapter draws together the lessons from the previous chapters in this report. First we will summarise the pedagogical wisdom from the literature review. Secondly, a matrix is presented, to provide an input to the TOP+ training model to be developed later in the project.

A summary of pedagogical - ‘andragogical’, ‘geragogical, if you like’ – factors and principles which need to be attended to in planning education for older learners:

1. Learner centredness – the starting point for learning of older workers must be on their level/background. Sometimes making older workers aware of the range of their skills is the starting point and an eye-opener and motivator for further learning.
2. Learning autonomy and agency: Respect and support older workers’ control for their own learning. Sometimes it is necessary to start by first ‘teaching’ older learners about these new (to them), self-direction- and constructivism-based approaches to learning in adulthood.
3. Focus on building and maintaining motivation: Feed especially older learners’ intrinsic motivation and cognitive interest to learn more of the subject in question and consequently to proudly improve their work performance. Set an appropriate level of difficulty.
4. Build on the learners’ knowledge. Assist older learners to build connections from the learning substance to their existing knowledge base. Prompt learners into reflection, problematising, asking questions.
5. Build on interactivity. Use ‘learning conversations’ through a dialogue and listening to the older learner. Show a genuine interest in their way of thinking and understanding and the reasons behind them. Divide and conquer! Break up participants into small teams when suitable.
6. Mutual respect between the older learner and the teacher (which may often be younger!)
7. Allow enough time for learning and flexibility for individual progress in learning – i.e. both in getting to know and grasping the material to be learned. Be patient. Sometimes the ‘breakthrough’ may take a good deal of time and joint effort.
8. Combine learning with doing, offer hands-on experience. Provide, and prompt older workers to discover bridges between the theory and their work practice.
9. Acknowledge individual differences in learning styles (‘multiple intelligencies’).
10. Provide high-quality contents that give all learners experiences of being challenged and of mastering.
11. Prepare the learning sessions well. Learning substance must be relevant and make sense for the critical older learners.
12. Provide feedback (positive reinforcement).
13. Optimize the physical learning environment.
14. Be attentive to the physical impairments that the older workers may have (e.g. vision, hearing, moving). Go easy on the eyes (use 14-point font if written material) and offer breaks at strategic times (without students needing to ask for them)!
15. Prompt for the use of IT. Make the unfamiliar comfortable!
16. Monitor the progress – of that of the students’ and your own.

Indeed, most of the above requirements should work perfectly for adults of any age, especially in case of low-educated. Very often the learning motivation and needs of adults are taken for granted, as is their success in learning under almost any kind of ‘teaching’. However, we are just as sensitive to various situational, personal,

The matrix for preparing learning activities for older workers is presented in table 14. The matrix just as the pedagogical principles and factors presented above draw from the multi-dimensional reality of educational planning and learning participation illustrated in Figure 2. As the recommendations for the further work in the project at the end of this report suggest, the input from this matrix shall not be considered as exhaustive. Rather, it should be used as indicative, heuristic tool, even if some parts of it are rather concrete. Also, the model assumes that much of the groundwork is in place concerning the learning activity, i.e. the decisions concerning the framework for the learning programme/activity have already been taken (e.g. financing) as well as the practicalities, such as the length, extent, etc. of the intended activity. The focus is on how to do it in a

Table 14. A factor matrix for preparing learning activities for older workers

Formal training	Workplace learning/HRD
<b>Before: Preparation</b>	
<ol style="list-style-type: none"> <li>1) Unless you already are familiar with the physio-psycho-social ageing process as well as work-age - challenges, study these before starting up with the planning.</li> <li>2) Run a competence analysis – in regards the learning substance</li> <li>3) Familiarise yourself with job situation of the learners:               <ol style="list-style-type: none"> <li>a. Job tasks and job experience</li> <li>b. Learning and development needs in regards their job</li> <li>c. Expectations in regards their job and work situation</li> <li>d. Confidence with their learning skills</li> <li>e. Confidence with skills in IT</li> </ol> </li> <li>4) Familiarise yourself with the learners (psychological, psycho-social, physical characteristics)               <ol style="list-style-type: none"> <li>a. Education background and prior experiences with training situations</li> <li>b. Learning attitudes</li> <li>c. Learning motivation (was learning participation initiated by the learner or by someone else?)</li> <li>d. Expectations from the training</li> <li>e. Expected use for the new skills and knowledge</li> </ol> </li> <li>5) Plan your teaching/implementation carefully. Prepare a curriculum.</li> </ol>	<p>Additionally:</p> <ol style="list-style-type: none"> <li>1) Get familiar with the workplace learning culture and ‘the intergenerational culture’ (age attitudes, situation of older workers, etc.)</li> <li>2) Secure that management is familiar with the internal course well and is giving their full support to it.</li> <li>3) Communicate clearly and agree on the framework for the use of resources (time, money) and how they are divided between the employer and the employee, if any.</li> <li>4) Work to maximize an employee involvement. The following approaches can be used:               <ol style="list-style-type: none"> <li>i. Consultation: Participants will be consulted before their decision to be with.</li> <li>ii. Representation: Use different interest groups in the decision making process.</li> <li>iii. Cooperation: All people concerned with the training are included in the decision making process.</li> </ol> </li> <li>5) Prepare for and plan the use of the space and tools in the workplace (e.g. is there a need for a separate room, e.g. to build a lab, etc.)</li> <li>6) When possible, involve older workers (and management) in the planning process.</li> <li>7) Use dialogue to communicate the goals and build realistic expectations.</li> <li>8) Relate the course to other change processes or projects in the company, if any/possible.</li> </ol>

Table 14 (continues...). A factor matrix for preparing learning activities for older workers

Formal training	Workplace learning/HRD
<b>Training: During the implementation (besides substance and goals)</b>	
<ol style="list-style-type: none"> <li>1. Create a positive, supportive, active and communicative learning environment.</li> <li>2. Familiarise the students to your teaching style and strategy. Older learners expectations from the learning situation may reflect their prior experiences and a passive learner – active teacher roles.</li> <li>3. Make sure that the learners get a chance to take self-initiative and be active/proactive in the learning situation. <i>‘Proactive learners learn more and learn better.’</i> Encourage dialogue.</li> <li>4. Support students to become self-directed learners. For some students skills for self-directive learning need to be learned first. To this end a good deal of help (how to?) and encouragement (to learner self-image, self-confidence, etc.) before they can start to direct their learning themselves. Anxiety, frustration and failure may follow, both among students and teacher, unless the situation is clear both ways. Allow some flexibility in the learning progress.</li> <li>5. Cover less subject matter in your teaching, but teach it more thoroughly (repetitions, check the students’ understanding, use concrete examples, encourage students to come up with suggestions for real-life connections, etc.).</li> <li>6. Provide an orientation basis which reveals core principles of the subject matter. Use it as an intellectual tool in formulating and solving student tasks.</li> <li>7. Aim at an iterative process, cycles of investigative learning for each thematic unit (motivation – orientation – internalisation – externalization – critique - control). Facilitate and guide the process.</li> <li>8. Encourage students to become critical learners by showing a good example yourself. Always ask ‘why’ and encourage students to do so too.</li> <li>9. Observe and feed students’ motivation continuously. Evoke students’ intrinsic, substantive motivation – interest in the use value of the subject matter. Challenge students to search for inner contradictions in practices and in knowledge.</li> <li>10. Be observant in regards your own instruction/progress vs. your curriculum.</li> <li>11. Require a lot from the students, each on their level, but show also respect all the way long.</li> <li>12. Monitor the progress of the learners. Carry out periodical check-ups (‘evaluation’).</li> </ol>	
Formal training	Workplace learning/HRD
<b>After the training</b>	
<ol style="list-style-type: none"> <li>1. Immediately after the training:               <ol style="list-style-type: none"> <li>a) Provide constructive and encouraging feedback to the participants of their learning performance.</li> <li>b) Ask for feedback from their perspective with a brief evaluation of the learning outcomes.</li> </ol>               Possible means: Joint discussion or a brief feedback form.             </li> <li>2. After a period after the training: Consider carrying out ‘a sustainability study’, an evaluation of the longer term learning outcomes and their use, individually or at the context of a job. Possible means: brief interviews (face-to-face or via telephone), a survey (online or a paper), or via e-mail.</li> </ol>	<ol style="list-style-type: none"> <li>1. Take a round with the participants in the training to hear about the effects of the learning on their work.</li> <li>2. Depending on the training substance, provide/organize support for implementation of the learning outcomes. Older workers have a tendency to ask less for help and use less manuals in problem situations. Consider using ‘godfathers/-mothers’, i.e. personal support persons (‘tutors’), especially with IT-related learning.</li> <li>3. Get feedback on the learning effects also from the management, if possible.</li> </ol>

best possible way when the participants are older workers, especially when also low-educated. The matrix is structured into three parts: before, during and after the implementation (Table 14).

As we can see from table 14, the matrix is build to allow some flexibility in regards the various forms of learning activities that older workers can engage themselves, as well as the variety of the learning providers. As Onstenk (1992) has pointed out, one consequence from the move away from the seniority-based careers to competence-based determination of careers is that training of employees is directed at the development of broad skills (“activity approach”). The idea is that besides the issues listed at the matrix, insights from the literature review, as well as from the findings in the partner survey can be used when planning education and training for older workers, in formal learning contexts or informally in the workplace.

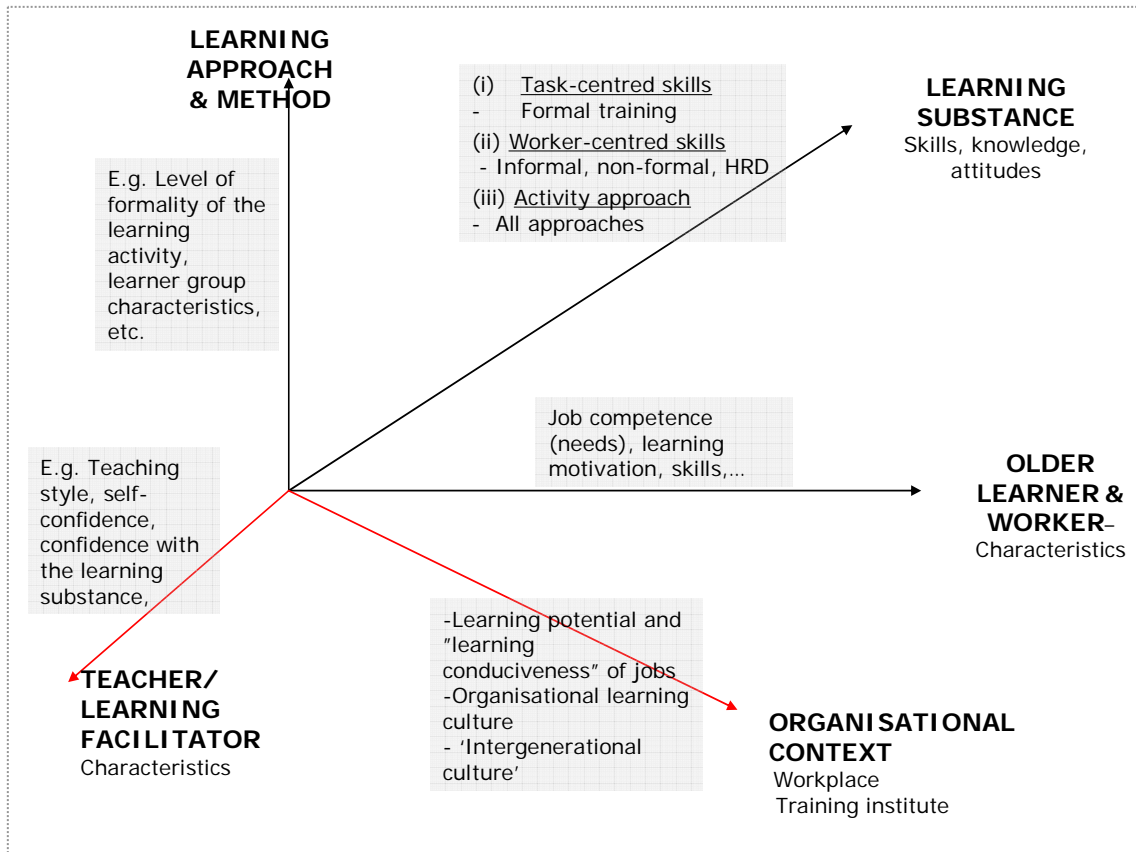


Figure 2. Learning dimensions in planning training for older learners

## 7 Conclusions for the TOP+ project further on

- *An experimental, innovative approach needed.* In the development of the TOP+ training model a good deal of innovation and creative thinking will be needed. This is necessary because there is little prior knowledge to build on when it comes to older workers.
- *The training model to be developed will have to be well balanced between the general characteristics of older workers and the heterogeneity of this group.* One size will not fit all. On one hand, there is a need for tailoring training due to the differences in regards jobs and working life, and different developmental prospects in different sectors in general. On the other hand a learning facilitator of older adults should be well aware of the physical/biological-psychological-social development related to higher age, i.e. the ageing process. The latter again, is highly individual, depending on a range of factors.
- *It follows from the above that the training model to be developed will have to be flexible.* It is important that the model can at least to some extent be modified in regards to the personal requirements of the training participants, but also in regards the learning contents and context.
- *Differentiation may be needed. Instead of one model, the development of two or three alternative basic training models may be more appropriate and realistic.* In particular the differences in educational background and adult literacy skills may require quite different methods to be applied by the learning facilitator. Also, the various purpose, goals and scope of the learning may necessitate different models to be applied.
- *Related to the above, HRD and workplace context may need a model of its own on the side of a more “pure” adult education model.*
- *On the most concrete level the model should be built on some core principles rather than constitute of a set of fixed properties.*
- *Recommendations for further training of the trainers needed.*

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## Appendix 1. Goals of the literature review (WP2)

The goal of this workpackage is to carry out a literature review, aimed at an overview of the-state-of-the art when it comes to training and other lifelong learning interventions targeted to older adults. Besides mapping the terrain, the work will also include a critical evaluation of the existing training provision.

Work package 2	Indicators	Short-term outcome	Long-term outcomes
WP 2.1 Data Assessment	<b>1 Matrix</b> for the (input) data collection	An analytical tool built for the information collection on lifelong learning for older adults (LLL) in the project.	Identification of Indicators of the what, where and how of efficient and effective practices in LLL programs targeted to older adults.
WP 2.2 Building a databases	<b>1 database</b> covering existing projects and programmes, web-resources, networks, academic literature and other documents	A project database comprising of an overview of the field of practice, as well as of evaluation and identification of best and worst practices, and relevant literature in English and other languages covered by the partnership.	Mainly the long-term outcomes will come about through the final report. The database can be made more broadly available under Cedefop's ERO, Training Village, Leonardo da Vinci and Socrates Projects compendiuns, etc. Contribution to improve LLL in later life: Best options: to who, how, when.
WP 2.3 Final Report	<b>1 Final Report</b>	A summary of the results of the review. Cooperative Benchmarking Report as a critical synthesis of the review and analysis. Input to WP3, WP3 and WP6	Contribution to improve the framework of knowledge on key-question to LLL in later life. Contribution to best use of results, innovative products and processes in LLL, and thereby to an improvement of the quality of education and training targeted to mature learners.

Indicators to be achieved	Most Relevant Outcomes	Activities leading to final Outcomes
<p><b>1 Matrix</b> to gather information about old adult education lifelong learning (LLL)</p> <p><b>1 database</b> of Projects, academic papers and other documents</p> <p><b>1 Final Report</b></p>	<p>The Final Report will a powerful catalogue of best and worst practices, and relevant literature in English and other languages covered by the partnership. Will highlight trainers, teachers and stakeholders about best LLL options: to who, how, when address the older adults.</p> <p>Under a conscientious <b>Ethical orientation</b>, the "worst" practice or useless strategies, will be mentioned <b><u>without any kind of reference to it's authors either individuals or institutions</u></b></p>	<ul style="list-style-type: none"> <li>▪ The first part of this task is to develop an analytic matrix of various types of training. Besides mapping the terrain, the work will also include a critical evaluation of the existing training provision</li> <li>▪ Feed a database with relevant practices (good and useless), and literature;</li> <li>▪ identify both the 'best' innovative lifelong learning programs and 'worst' practice, and factors behind them;</li> <li>▪ Analyse all data and Produce a Report with Cooperative Benchmarking orientations: the impute to WP3, WP4 and WP6.</li> </ul>

## Appendix 2. The survey details

### The survey: Themes and items

1. National framework for learning and training of older workers
  - 1.1 Regulative framework for studies later adulthood**
  - 1.2 National learning culture**
  - 1.3 The role of social partners**
  
2. Key-issues concerning lifelong learning and older workers
  - 2.1 Key issues concerning lifelong learning in general**
  - 2.2 Key issues concerning adult education and training**
  - 2.3 Key issues concerning older workers**
  
3. Learning possibilities available for older workers
  - 3.1 Training providers – formal**
  - 3.2 Informal learning opportunities in your country**
  - 3.3 Workplace learning**
  
4. Competence and competence development of the teachers of older adults
  - 4.1 Teacher training in adult education (AE)**
  - 4.2 Continuing education and training (CET) for teachers in adult education**
  - 4.3 Special competence on teaching older learners**
  - 4.4 Training about older people in general**
  
5. Learning needs and informal lifelong learning among the teachers of older adults
  - 5.1 Informal learning undertaken by teachers in adult education**
  - 5.2 Learning needs among teachers in adult education**
  - 5.3 Special competence on teaching older learners**
  
6. Monitoring of participation in adult education (including informal learning activities)
  - 6.1 National surveys**
  - 6.2 Participation in European monitoring**
  
7. Best and worse practice of lifelong learning initiatives targeted to older workers
  - 5.1 Best practice in training targeted to older workers**
  - 5.2 Worst practice in training targeted to older workers**
  - 5.3 Best practice in (informal) workplace learning projects targeted to older workers**
  - 5.4 Worst practice in (informal) workplace learning projects targeted to older workers**

List of literature used for the above overview

Persons consulted to supplement the literature review (if any)