



# NIACE Maths, ICT and Older Learners Project (MICTOL)

Final Project Report 24-04-08

Jay Derrick, Janet Swinney, Nigel Robinson, Sue McClure, Joan O'Hagan

*There is no stereotypical person over 50.*

From Final Development Project Report, Sunderland City Council

*Every individual ages differently. Growing older can be seen as a complex interaction of biological, psychological, historical and social processes, and it seems that, as we age, we actually become more different rather than more alike. Apart from the influence of age itself, and of gender, class, race, ethnicity, marital and socio-economic status, living arrangements and perhaps religious belief, older people are highly diverse in terms of their physical functioning, psychological performance and overall health status.*

From Older People Learning myths and Realities by Alex Withnall, Veronica Mc Givney and Jim Soulsby (NIACE 2004)

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## **Executive summary, findings and recommendations**

### **Headline Findings:**

- there are very few examples of provision for older learners that combine Maths and ICT
- older Learners are still marginalised in practice by the systems for provision, in spite of their importance in policy on the economy and social inclusion
- ICT provision is a popular hook for increased participation by older people in learning in other subjects
- older people are interested in courses in topics such as Financial Literacy or Healthy Living that involve ‘mathematical thinking’, but are not attracted by Maths courses per se
- the concept of ‘employability’ as an objective of learning should be broadened to include the various kinds of temporary, part-time and voluntary work, including caring for relatives and friends, through which very many older people already contribute significantly to the economy
- older learners, particularly those less well-qualified, are usually put off gateway learning opportunities if formal qualifications are required

The Maths, ICT and Older Learners Project was commissioned by the Department of Innovation, Universities and Skills (DIUS) and carried out by the National Institute for Adult Continuing Education (NIACE) between October 2007 and April 2008. Its objectives were to identify factors that are influential in helping older learners develop their skills in Mathematics and ICT, and by doing so improve their social inclusion and employability. Specifically, the project aimed to review relevant literature, to facilitate focus groups, to establish development projects aiming to evaluate innovative delivery of relevant programmes of learning, and to set up an online community as part of the QIA Excellence Gateway. It undertook to produce a report making recommendations (this is the executive summary of that report) and to disseminate the findings of the project through publications and presentations.

### **Key findings of the study**

#### **Numeracy and ICT skills of older learners:**

- older people are not a homogeneous group but vary widely in their interests, skills, circumstances and needs
- although there is not a strong correlation between age and numeracy performance, 55-65 year-olds perform less well than 16-24 year-olds
- employed adults perform at a significantly higher levels in both Maths and ICT than non-employed, with the sharpest dividing line between those doing full-time work and the rest
- men have significantly better numeracy competence than women across virtually all age groups up to 65.

#### **Engagement of older learners in Maths and ICT programmes:**

- a key to engaging older people is through working with voluntary and community groups and agencies already known and trusted by them

- taster workshops followed by short courses are an effective means of engaging older people in learning something they have not tackled before.
- financial capability programmes are attractive to older people, but are not widely available
- based on existing patterns of participation in learning, older people are very keen to improve their ICT skills, but generally not keen to engage in Maths learning
- ICT programmes are successful in attracting older learners, for social inclusion and financial capability purposes rather than for employment
- promotional materials will be more effective if they emphasise the benefits that can be gained through learning, rather than focussing on 'deficits' in the learner
- gaining formal qualifications is a motivator for very few older people in their learning
- 'soft outcomes' were of great importance to learners, but so was achievement of specific formal learning goals: gaining skills for employment did not appear to be a high priority.

#### **Provision of Maths and ICT for older learners:**

- awareness of the potential role of ICT to stimulate political involvement through active citizenship is very low, not just among older people but among Adult Learning practitioners
- there is a lack of readily available, appropriate ICT resources for developing the numeracy skills of adults
- combined Maths and ICT in programmes of learning for older people are rare, but can be effective
- teachers working on integrated Maths and ICT programmes are very likely to need training in the subject in which they are not already qualified and experienced
- providers are discouraged by funding and accountability from making provision specifically for older learners, and from recruiting them to other provision.

#### **Social inclusion and employability:**

- the impact of poor numeracy and ICT skills goes beyond employability/earnings. affecting levels of social inclusion, civic participation and quality of life
- there is no indication that most employers are waiting to recruit older learners if and when they have acquired appropriate qualifications and skills
- policy regarding the employability of older people has so far had little impact at grass-roots level
- policy statements concerning older people see learning too narrowly as a means just to achieve employability
- there are insufficient financial incentives for older people to enter or re-enter the labour market
- policy on employability has too narrow a view about what it means to be 'active in the economy' and 'employed'
- the role of intermediary bodies is crucial, and there is a need for greater urgency and focus to deliver change in relation to older learners, social inclusion and employability.

## Key recommendations

### For practitioners:

- Numeracy programmes in particular should always be structured around topics and tasks that are relevant and practically important for the learners. They should also be ready to move to broader and more theoretical areas of mathematical thinking when learners are ready for this
- Key success factors in provision for older learners include effective and empathetic teachers, the informal character of the courses, small group sizes, the timing of sessions, the absence of pressure to take tests, and the freedom of learners' to work at their own pace.

### For provider organisations:

- ICT-led programmes planned to lead to other learning should be developed, aimed specifically at older learners
- More non-accredited programmes in Maths and ICT should be made available, particularly for older people, and including Financial Capability and Healthy Living programmes
- Development programmes exploring different approaches to ICT programmes with Maths embedded in them should be established
- Providers should work harder to make provision available in community settings, care homes, libraries, where non-participating older learners may be found
- Appropriate resources should be available for 'blended learning' approaches
- Specific training should be made available for teachers working across Maths and ICT

### For funders and policymakers:

- Strategies aiming to promote older people's participation in learning should not require older people to work towards qualifications as a condition of their learning
- Develop research into the social and economic benefits of helping older people remain healthy, socially engaged and independent as a result of participation in learning, and use the outcomes of this research to inform any future policy on social and economic inclusion.
- The LSC should give clearer, more explicit, guidance to providers of post-16 education about their role in relation to furthering the social and economic inclusion of older people.
- Sector Skills Councils should provide clearer guidance for older people and providers of post-16 education on the skills older people need to acquire/develop to be able to enter/re-enter various parts of the labour market.
- The current inspection regime should be strengthened so that it offers a clear, evaluative focus on appropriate provision for older people in every area.
- Broader and more systematic approaches to piloting and evaluating combined ICT and Maths programmes for older learners should be implemented
- LSCs should encourage joint programmes of ICT and Maths, especially when the aim is to target marginalised groups of learners.
- Incentives should be created for providers of post-16 education to develop financial capability programmes for older people.

- It is recommended that the Online Forum created by the project is left as a closed but viewable forum after the project but with the MICTOL final report and other relevant documents published to the QIA's Resources section.

## **1. Introduction and Context**

The Department for Innovation, Universities and Skills (DIUS) commissioned the National Institute of Adult Continuing Education (NIACE) to undertake this project in the light of a number of related issues:

- The promotion of active ageing (see for example Opportunity Age - Meeting the challenges of ageing in the 21st century, DWP 2005), through learning, employability and inclusion.
- The urgent need to develop world class skills to create an economically competitive and socially inclusive society (Leitch 2006).
- The emphasis in the Leitch Report on the role of numeracy skills; the associated targets for numeracy achievement; and the emerging Numeracy for Employability strategy.
- Current debates about how best to continue to support adult learning; in particular adult learning related to social justice and active citizenship.
- Concerns about how to ensure that older adults have access to, and benefit from the ever-expanding range of Information and Communication Technologies.

DIUS asked NIACE to explore and report on ways in which these issues could be addressed via activity which linked the development of numeracy and ICT skills amongst older adults.

## 2. Project Objectives and Key Questions

To identify factors that are influential in helping older learners develop their skills in Mathematics and ICT, and specifically, to:

- review existing literature regarding numeracy and ICT awareness among older people; the skills levels of older people in relation to numeracy and ICT, and the impact of low ICT and numeracy skills on older adults' lives
- review existing literature on policy, projects and initiatives that support older learners in developing their skills in Maths and ICT in order to identify successful strategies for engaging older people, effective approaches to teaching and learning, good quality resources and quantitative and qualitative evidence of achievement
- referring to the above, and also through using focus group work, to identify the key issues which are likely to engage older adults in ICT and numeracy learning, and key factors which will support their persistence in learning and the development of their skills
- identify or establish development projects which address these issues and evaluate practice
- develop a community of practitioners involved in development project work and support them through an on-line presence on the QIA Excellence Gateway
- produce one or more publications offering advice to practitioners
- produce a report on all the above for DIUS, including recommendations for future practice in this area.

All these to be informed by data collected aiming to address these key questions:

1. What do we know about the Maths and ICT skills of older people?
2. What does the literature and current practice tell us about successful engagement of older people in Maths and ICT learning?
3. How successful is current provision in improving mathematics and IT skills and in promoting social inclusion and employability through Maths and ICT learning?
4. Is combining Maths and ICT learning a suitable strategy for furthering the social inclusion and employability of older people?
5. How can older learners be supported to persist and progress?
6. How effective is current policy in promoting social inclusion and employability for older people through Maths and ICT learning?

### 3. Methodology and project plan

The project utilised a mixed-methods methodology in order to generate information and evidence from a range of activities initiated by the project. This evidence was subjected to analysis primarily of a qualitative nature, to produce findings, conclusions, and recommendations for various stakeholders.

The project team (which includes NIACE staff and consultants with a range of expertise in Adult Learning, ICT, Maths / Numeracy, and quality improvement) set itself the following objectives:

- draw on and make connections with a range of existing NIACE initiatives on older learners, older workers, financial literacy, maths/numeracy learning and ICT learning
- learn from and share with all participants insights from a wide range of “external” projects
- draw on and develop the expertise and knowledge of learning providers, community workers, and learners already active in these areas.

In order to achieve these objectives, the following practical activities were planned and implemented:

- Reviews of relevant literature and of current practice: three separate pieces of work were carried out, the first looking at policy documents, the second at relevant projects and initiatives, and a third one on (a) numeracy and ICT awareness, skills levels and practices, (b) take-up of learning opportunities among older adult learners, and (c) the impact of low ICT and numeracy skills on older learners’ lives. In relation to policy, the project team reviewed the policies of transnational, governmental, national and regional organisations with regard to promoting the social inclusion and employability of older people through the experience of learning. We examined evidence from sources likely to influence policy as it affects older people. We also examined whatever evidence we could find relating to education and training initiatives, driven by policy, that have had a direct or indirect bearing on older people.
- Development projects in 5 provider partners: these were selected from a number of applications in order to provide geographical spread, a range of types of provider and local context, as well as different emphases within the overall project’s key concerns. The successful projects were also chosen because it was felt that their plans were likely to be more viable. The projects were commissioned in December 2007, allowing a short period for consultation, marketing and publicity, and for programmes to take place in February and March 2008. Timescales were very short, but in spite of this all the development projects successfully carried out their contracted programmes, though all recruited fewer learners than was planned.
- 4 focus groups of learners and practitioners discussing the project’s key questions: three of these took place in settings other than those chosen for the development projects, and one was within one of the development projects. Semi-structured schedules were used and 38 people contributed.
- An online community of practitioners and others, discussing the project’s key questions. This was set up in December 2007 as a discussion group on the QIA

Excellence Gateway, and development projects were encouraged to register, contribute and participate in online discussions.

- Four project team meetings to discuss the evidence generated and findings that emerged.
- Dissemination activities will take place on completion of the project. They will consist of articles in journals such as Adults Learning, Basic Skills Bulletin, and Reflect; and workshop presentations at relevant conferences during the summer and autumn of 2008.

Reports on all of these activities follow, accompanied by key findings from each. These contributed to overall project analysis, findings and recommendations.

#### **4. Project activities**

##### **4a. Review of literature on Numeracy and ICT awareness, skills levels and practices, take-up of learning opportunities among older adults, and the impact of low ICT and numeracy skills on older adults' lives.**

The detailed findings of this review are incorporated into the discussion later in this report. Some raw data on older people's participation and qualifications in Maths and ICT learning are given in Appendix 1.

##### **Findings: Numeracy and ICT skills levels**

- there is a positive connection between the levels of literacy and numeracy competence and ICT competence
- though there is not a strong correlation between age and numeracy performance, 55-65 year-olds perform less well than 16-24 year-olds
- employed adults perform at a significantly higher numeracy level than non-employed, with the sharpest dividing line between those doing full-time work and the rest
- men have significantly better numeracy competence than women across virtually all age groups up to 65
- there is a clear and significant connection between the level of numeracy skills and earnings
- 55-65 year olds perform at a significantly lower level than other age groups in terms of ICT
- a relatively low percentage of 55-65 year olds are frequent users of computers and over a third had never used one.
- those in employment and those looking for work have significantly higher ICT skills than others
- there is some evidence that over the age of 65 numeracy skills do decline with age.

##### **Findings: Skills, Employability and Inclusion**

- the great majority of those with weak numeracy skills do not think that their skills levels have a major influence on their employability
- there is a significant positive connection between the level of ICT competence and earnings
- poor numeracy skills may also have significant negative impacts on older adults in retirement in the event of life changing events, particularly bereavement, as well as in connection with such aspirations as voluntary work or taking up new interests
- those older adults who are using the Internet are using it a great deal, that is, more or less every day, suggesting that there exists a 'digital divide' within the older adults group as well as between it and the rest of the adult population
- according to data collected in 2003 (DfES 2003), 51% of the adult population of the UK, or 24.2 million were digitally excluded in the most basic sense – they did not have access to home computing and the Internet. The overall profile of the digitally excluded population was proportionately older than the digitally included population, with a higher percentage occupying the 55+ age group than the UK average. The proportion of the 65+ age group who were shown as digitally excluded is marked when compared with the base population and all other age groups. These data need updating, and we can assume that patterns of computer ownership will have changed significantly during this period, though it is likely that

digital exclusion is still a problem for many older people, and may have become a more intractable, concentrated and deep-rooted problem as with other areas of social exclusion.

- while there is a relatively low level of older adults participating in learning - the decline in participation is particularly steep for those aged 55 and over, such that only 34 per cent of adults aged 55-64, 19 per cent of adults aged 65-74 and 10 per cent of those aged 75 and over regard themselves as learners. In addition, over half of all adults aged 65 and over say that they have not participated in any learning since leaving full-time education - of those that are, the percentage engaged in studying computer skills is remarkably high
- 24% of adult learners of all ages report learning computer skills. Taking all adult learners over 45 that number rises to 31.8 per cent; among all learners over 55 it rises to 40.6 per cent, and for adults between 65 and 74 computer skills account for 51.3 per cent, more than half, of all learners. Even for people over 75, computer skills account for one in three of all the learning activities undertaken
- the impact of poor numeracy and ICT skills goes beyond employability/earnings. affecting levels of social inclusion, civic participation and quality of life
- the need for adult numeracy/mathematical skills, including the communication of information based on mathematical data, is being progressively extended throughout the workforce as a result of the pressure of business goals and the introduction of IT. Employees increasingly need to have broader general problem-solving skills, inter-relating IT with mathematics
- in common with adults of all ages, few older people, even amongst those whose skills have been assessed as low, see their numeracy skills as weak
- the take up of numeracy learning opportunities by older adults is very low: for example, for those with English as their first language, fewer than one in ten respondents (8 per cent) had any training in basic maths or number skills and that those in the oldest age groups (55-65) were slightly less likely to have done such training than the other age groups.

**4b. Review of policy documents relevant to the promotion of social inclusion and employability through Maths and ICT learning among older people**

The detailed findings of this piece of work are incorporated into the discussion later in this report. Briefly they are that Western European countries face similar challenges relating to the pensions crisis, the need to improve skills and productivity, and the complex social and health issues associated with ageing populations and a widely shared commitment to the promotion of active ageing. One of its main conclusions is that the broad policy objectives developed in respect of the 50+ cohort are surprisingly well aligned across education, health, pensions, and employment, but that implementation of these policy objectives at arm's length by the different ministerial departments nearly always results in the relative marginalisation of older people, who within those departments' overall responsibilities, are overshadowed by other groups. Older people are rarely the subject of quantitative targets for educational activity and outcomes, unlike, for example, 14-19 year-olds, or adults with low levels of basic skills.

Connected with this point is the conclusion that though relevant policy statements, campaigns, and initiatives are not difficult to find, few of them are explicit about the scale of their activities, the success criteria being used to evaluate them, or the impact they have had on policy, practice and outcomes.

In terms of the overall orientation of policy, a noticeably narrow and unproblematic conception of employment is found in nearly all policy documents. There is little acknowledgement of the extent to which older people contribute indirectly to the economy through unpaid work, either in volunteering contexts or by caring for relatives or friends. Secondly, many older people would not agree with the slogan 'employment good, retirement bad' that is broadly unquestioned by nearly all policy documents:

*'I am 67, I worked from 14 to 65: on a farm, in the Army, down the pits and in factories. I am exhausted. I want to win the Lottery and live in Australia. I don't want to be employable or employed'* (Researcher field notes)

More detailed discussion on these points can be found in the overall discussion later in this report.

#### **4c. Review of projects and initiatives relevant to the promotion of social inclusion and employability through Maths and ICT learning among older people**

The aim of this study was to identify literature, projects and initiatives that develop simultaneously the Maths and Information Communication Technologies (ICT) skills of older people. A literature search was conducted and an email inquiry sent to NIACE's relevant mail groups and contacts. The outcomes were as follows:

##### **Projects and initiatives**

As few projects and initiatives met all of the search criteria, the review extracted key learning points from work aimed at developing the ICT and numeracy skills of generic adult groups and from projects that developed either the numeracy skills/financial capability of older people or their ICT skills. The following conclusions have been drawn from these literatures.

##### **Engaging older people**

A key to engaging older people is through working with voluntary and community groups and agencies already known and trusted by them. These groups can enable access, signpost or refer older people to learning provision and provide friendly informal venues for learning delivery. Effective partnerships can be crucial to success.

Older people are most likely to be attracted by specifically targeted marketing materials and content tailored to their interests and needs.

Older people are not a homogeneous group but vary widely in their interests, skills, circumstances and needs. Designing programmes to attract subgroups with common interests or at a common life stage may be effective. Informality and one to one attention may be important in initially attracting disadvantaged older people.

##### **Effective teaching and learning**

Many effective teaching practices are applicable to all adult learners, although good practice may be particularly important when working with older people. Ways of promoting learning include: linking skill development with the interests and needs of target groups; taking account of learners' preferred learning styles; using a variety of activities and resources, and; structuring, reinforcing and consolidating learning. Teaching ICT and numeracy simultaneously presents practitioners with the challenges of achieving a balance between learning needs in both subjects, and integrating ICT into subject teaching. Some numeracy and Maths practitioners may benefit from ICT skills training.

Older people often appreciate practitioners who are supportive, patient and aware of their needs; learning with their peers; short, slow-paced sessions; repetition of key learning points; and adaptations to the environment and equipment to meet their sensory and physical needs.

##### **Resources**

There is a lack of readily available, appropriate ICT resources for developing the numeracy skills of adults. Materials for older people support the development of financial capability rather than numeracy more generally. Some resources are based on research, and in some cases it is not always clear whether materials have been evaluated.

### **Evidence of achievement**

Evidence of achievement in terms of passing tests or progression is sparse, possibly because many studies did not seek the relevant data. However, where progression is limited, this may be a consequence of other challenges noted above, namely: limited teaching and learning resources; the difficulties of integrating ICT in numeracy teaching and achieving learning objectives across more than one subject; and limited practitioner experience of so doing. Changes in the skills and attitudes that enable learning such as increased confidence, motivation, concentration and autonomy were evident.

#### 4d. The Development Projects

The development projects were chosen after a careful selection process. Organisations were invited to apply to run development projects as part of the project, and potential applicants were advised that their projects should address one of the following themes:

- Encouraging community involvement, community capacity-building and/or community action among older people (the community could be either real or 'virtual')
- Developing the employability and/or enterprise skills of older people
- Helping older people maintain their personal autonomy and resist financial abuse through developing their skills in financial literacy
- Helping older people maintain a healthy lifestyle

In the event, the overwhelming majority of applications addressed financial literacy issues. Participants were chosen so as to represent different kinds of provider, and a spread of geographical locations, as well as offering a wide range of different emphases within the overall project objectives and research questions. Coherence of the individual applications themselves was also a central selection criterion, combined with a convincing explanation of the way the development project would contribute sustainably to the organisation's activities in the future. The full final reports from each of the Development Projects are appendices to this overall report.

##### 1. Northern College

Northern College undertook to develop two new courses, as part of its programme of short residential courses. They were to be aimed at older learners, focus on managing finances and health, and were called respectively *Managing Money* and *Healthy Numbers*. The aim was to embed ICT within programmes of numeracy, and accredit learning using the NOCN Progression Award 'Using Common Measures' at Level 1. 'Distance travelled' by the learners was also measured using a RARPA-type process, which included the use by learners of the college's online ILP system for their reflections on the courses and their individual progress. *Healthy Numbers* explored the maths found in hospitals and doctors' surgeries, such as dosages, body temperatures and vital signs. It explored the differences between metric and imperial quantities, and introduced such concepts as a 'balanced diet'. The *Managing Money* course examined how to manage a budget and check bills, understand interest rates, and calculate sales discounts. It explored some issues that affect many older learners including looking after cash and dealing with debt. Specific attention was paid to blending e-learning into the numeracy activities, with the aim of getting learners to see ICT as a tool for learning. Laptops were used so that ICT was not seen as a separate activity. This development project was valuable as being the only 'Maths-led' project of the five, and the only one where the programmes were residential.

12 students were recruited for each course as planned, but completion was lower than anticipated in both programmes, with 8 completing *Healthy Numbers* (six of them over 70) and 5 completing *Managing Money*. However, almost all the learners who completed achieved the NOCN award, and all believed they had developed their skills and confidence in Maths and ICT. Specific findings include:

- the importance of designing courses around functional/everyday tasks which are sufficiently relevant and stimulating enough to motivate learners to find solutions

- the importance of the Maths/Numeracy tutor having sufficient ICT skills to accommodate the blended approach
- the allocation of sufficient resources to facilitate the blended approach (e.g. a mobile classroom that 'blends' into a standard classroom, so all activities can take place there)
- courses should be marketed in a non-threatening and enthusiastic/fun way
- effective approaches to teaching and learning: this project used active learning and collaborative approaches throughout, as evidence shows learning through discussion maximises opportunities for learners to make connections and build on their existing knowledge of the world (exploiting connectionist and constructivist teaching and learning strategies). All the learners liked working collaboratively and in pairs rather than on their own at computer screens.

The college comments that the reasons for the low numbers completing included cancellations due to last minute childcare problems and illness. Three people didn't show up to the *Managing Money* course without giving a reason, and the college suggests that this may be connected with the course required no prior commitment, as no fee was charged. Subsequent programmes of both *Managing Money* and *Healthy Numbers* have been over-subscribed.

This project reports that the residential element provided very clear benefits. Course participants are given homework practice sheets to do in the evenings, immediately after the taught sessions, which they tend to get done collaboratively in clusters, benefiting from peer learning: *'one learner's perception of the use of spreadsheets did a 180° turn overnight for the positive.'* The use of laptops made a significant difference too: *'they could be used seamlessly and fully integrated into the flow of the course, much more than desktop PCs can be; with PCs students move over to them, then generally have their backs to the tutor and the rest of the group. Using laptops makes the use of ICT more an integrated tool, like using a calculator, rather than a course in IT.'*

## 2. Digital Unite

This development project was called *Moneyfingers*, and undertook to develop and deliver programmes of ICT and financial literacy to older learners in two sheltered housing environments in East Sussex. Delivery of the programmes was preceded by an extended consultation stage with potential learners and with the board members of a specialist voluntary organisation called EROSH (Essential Role of Sheltered Housing). This explored the ways potential learners were using the internet, and their confidence and feelings about digital technology. The programme developed following the consultation comprised an engagement session and 5 tuition modules, supported by an interactive online group established on Facebook.

The development project's findings were as follows:

- financial literacy, embedded within a digital literacy programme, can be a popular and engaging topic
- older people are keen to learn more about the advice and services on financial matters available on the Internet and will use services when they are shown how to do so
- materials must be relevant to their needs and must reflect their prior knowledge and understanding of issues, which are generally better than those of younger

- people who have not had to manage money for many years
- a good tutor is key to effective engagement of older people and a successful learning programme
- although people are keen to participate in a programme and clearly enjoy it, they have limited motivation to do 'homework' exercise between sessions
- a key concern for older people in using the Internet is security. While they will gain confidence through knowledge, it is essential that they continue to be aware of the risks and understand what measures they can take to minimise them
- ongoing support is essential. While web based systems, such as social networking websites can facilitate this, there is no substitute for a real person to answer questions and provide help.

### **3. Westcliff Neighbourhood Drop-In Centre**

This development project took place in a small neighbourhood community centre located on a high-deprivation housing estate in Scunthorpe. The centre is user-led and managed by local people. The centre had already identified that users were interested in learning more about healthy eating and in learning how to use computers. The aim of this project was to provide a course in healthy living looking at food, nutrition, the benefits of a balanced diet, and providing healthy meals on a budget, and to help learners access web-based resources and information through teaching introductory computer and ICT skills embedded in the programme. Maths learning was also embedded through the use of recipes, measuring and different systems of weights and measures. The programme was called 'The Yum Yum Project', and consisted of 3 x 2hr sessions per week for 12 weeks.

*'We want to help our community members with very limited Maths and ICT skills learn how to make the very best use of the limited income that they have to spend on food and aim for positive improvement in well-being, increased relevant knowledge and confidence along with the provision of a supported and linked pathway through the project to working with them to increase their Maths and ICT abilities, skills and experiences. Involvement and participation in this initial project will also be used as a positive platform to re-engage learners involved with linking to a wide range of other learning opportunities which are available within our Drop-In Centre' (Westcliff Application Form).*

14 people, most of them aged over 50, enrolled on the course in its early stages, but few continued attending the whole course. People tended to 'dip in and out' due to illness, school holidays, and appointments. Two sessions had to be cancelled due to tutor illness, and towards the end of the course one of the two venues for the course was set on fire by vandals, which necessitated hasty relocation of the course and caused disruption. The project's own assessment of its difficulties is worth recording:

*'The people who live on the Westcliff estate have so much going on in their lives it is sometimes impossible to evaluate the success or failure of a project and often the successes can only be seen by our own observations. By this I mean that people sometimes find it difficult to participate on a long-term basis because they don't know what 'lies round the corner'. (Westcliff Development Project Final Report)*

In this context, the fire incident was just one among many factors tending to undermine learner persistence. Some messages from the Westcliff development project:

- recruitment should be carefully planned, allowing sufficient time to try different sources, and for word-of-mouth publicity to be effective
- let participants contribute to deciding session content
- have an induction day to inform participants about the course programme, explain expectations and allay fears
- be careful with language – assessment, exam, test, etc
- avoid formal assessments except where individuals are identified as looking to return to work. Be prepared to use informal and observational assessments, and record their outcomes
- encourage projects which offer participants fun and informality
- recognise the ‘very positive’ social element of taking part, that was seen as ‘good for the community as a whole’
- 50+ learners are a group with diverse, sometimes complex needs. Allow time for planning accordingly
- worrying about involvement with Maths is a barrier to attendance
- ICT is much the stronger motivator compared with Maths, but for some of the cohort, cooking and eating well may be more attractive and more personally useful
- ICT may be best offered in a ‘taster’ and ‘user led’ context.
- many older people have no intention or desire to return to work.

#### **4. Calderdale College**

The Calderdale development project took place in the North Halifax Skills Centre in an area of Calderdale with high unemployment. The context for the project was the opening of a new superstore offering employment to older workers, provided applications could be made online. A training programme was developed by Calderdale College incorporating job search and employability skills, ICT, numeracy and financial literacy. The programme was marketed to all past learners at the centre who were aged over 50. Initially recruitment was slow, and the course was rescheduled to allow more time for recruitment. In the end 19 learners were enrolled, with varied experience and skills levels. Few of these actually were interested in returning to work. The course schedule was continually modified to suit the requirements of the learners. It is clear that the main attraction of the course was the opportunity to work on improving ICT skills, rather than employability or Maths. The learners who completed the course want to carry on studying as a group. None of the learners who joined the course have moved into employment so far, but there is evidence that the learners’ ‘soft skills’ were enhanced through their participation on the course, and that attitudes to Maths have been positively influenced by the programme.

#### Messages for practitioners

- Plan recruitment carefully, and where ever possible, begin marketing at least a month before delivery is to begin. Our recruitment was done in three phases
- As the lead in and delivery time was short it was necessary to recruit over a period of several weeks; tutors found it difficult to accommodate new learners into the ongoing programme
- Keep groups small if possible. ICT work is very tutor-intensive and learners need that small group tutor support and input and the opportunity to try things themselves
- Value the experience of the learners. Learners in this age group have great life experience and can benefit from one another

- Embed the maths! Maths/numeracy sessions still do not attract learners who often have prior negative school experiences; embrace the idea that older learners have got through life so far and know what they need
- Recruit experienced, mature, flexible tutors to teach to this age group
- Listen to the learners. Let them tell you what they want to learn
- Be aware of the problem of formal assessments and their possible reminder of maths lessons. Maths needs to be seen as relevant to each learner.

#### Messages for Funders and Policymakers

- Allow for small groups
- Offer nationally accredited tests only as an option, and not as compulsory
- Provide the opportunity to be creative in course content.

### 5. Sunderland City Council

The Sunderland project was informed by a detailed analysis of the 'senior population' of the City, including numeracy levels by ward, indices of deprivation and health, and there is a clear correlation between poor basic skills, high unemployment and poor health. In nine of the most deprived wards, for example, over 65% of the population have numeracy skills at Entry level or below. 10% of the city's population are permanently sick or disabled, and 39% of residents are overweight. 47.5% of older people are on low incomes. The pilot was run by the Family Adult and Community Learning service of the City Council, and aimed to attract 90 learners on to three Wealth and Health day workshops, giving support on financial literacy and healthy eating within a limited budget. The workshops were planned as an introduction to a more substantial course called Money Magic, to be run in three venues around the city for one session per week over 5 weeks: it was hoped that 30 of the original learners would enrol on this. Marketing involved a range of local organisations such as Age Concern and the Library Service. The programmes themselves were developed in partnership with a wider range of relevant organisations including Age Concern, Wearside First Credit Union, the local Primary Care Trust, a local Social Housing company, and the Sunderland Centre for Voluntary Service. 44 learners enrolled for the 3 workshops, and of these 22 went on to participate in Money Magic. The programme collected detailed data on the learners' attitudes to learning and their purposes in joining.

#### Some messages from this project:

- financial issues and debt were a key topic for this cohort of learners
- close involvement of a range of organisations concerned with this cohort paid dividends in terms of recruitment and focus for the programmes
- 'soft outcomes' were of great importance to learners: gaining skills for employment did not appear to be a high priority
- most learners were not aiming for qualifications, and many actively did not want to take formal assessments
- 70% of the learners said they would not have joined a discrete Maths or ICT course
- the majority of those that completed the course said they were more interested in further learning
- key success factors were effective and empathetic teachers, the informal character of the courses, small group sizes, the timing of sessions, the absence of pressure to take tests, and learners' ability to work at their own pace.
- ICT should only be used when it is appropriate, not just because it is available
- the positive outcomes expressed by learners themselves, including future intentions to continue learning, were the product of a relatively short programme.

This suggests that 'harder' outcomes may be achievable for some learners if they can start with introductory programmes such as this one.

#### 4e. Focus groups

Four focus groups took place as part of the MICTOL project:

1. one group of ICT learners not participating in a MICTOL development project (Headworks, Gateshead)
2. one group of adult learners, not currently learning either ICT or Maths, and not participating in any of the development projects (Bensham Grove Community Centre, Gateshead)
3. one group of older people living in sheltered housing and not currently in structured learning of any kind (Tom Urwin House, Silksworth, Sunderland)
4. one group of Maths/ICT learners taking part in one of the MICTOL development projects (North Halifax Skills Centre, Calderdale College)

#### Characteristics of those participating:

Total no. of participants = 38

Men		Women	
No	%	No	%
9	24	29	76

Age 50 – 64 yr		Age 65+ yr	
No	%	No	%
10	26	28*	74*

\*All of the older people living in sheltered housing were aged 80 years or over. Some were over 90 years of age.

Twenty-three participants (61%) described themselves as living independently with minimal support from others; fifteen (39%) described themselves as living with support of some kind. Those living with support were, of course the older people in sheltered accommodation, but two members of the Headworks group also described themselves in this way.

#### Views from the Focus Groups

##### Mechanisms for engaging older people in Maths/ICT learning:

- Short taster courses, delivered by patient, understanding tutors are highly effective in motivating learners new to ICT to take their studies further
- learners who have had good prior experience of a provider may be persuaded to develop new skills with the same provider.

##### What motivates or doesn't motivate older people to engage in learning in general and in Maths/ICT learning in particular?

- Older people value low cost provision, run during the daytime in venues that are easy to reach

- older people who are already engaged in learning see learning as a worthwhile activity in itself. They see it, above all, an important means of self-fulfilment, but also as a means of remaining **socially included**
- experienced learners have become adept at developing 'learning pathways' for themselves
- above all, older learners crave the opportunity to learn something they have not been able to learn before
- older learners welcome the chance to keep up-to-date with the way the world is changing
- older learners are aware of the risk of social exclusion if they do not develop ICT skills. On the whole, they are keen to develop these skills
- most learners engaged in ICT or Maths/ICT learning view it as a means of pursuing personal enthusiasms, rather than as a matter of personal survival
- few older learners are aware of the possibility of developing their role as active citizens through the use of ICT. This aspect of social inclusion has a low profile
- there is scope for helping older learners develop more advanced e-learning skills by promoting the use of e-technology to support other learning
- a poor initial learning experience can be fundamentally damaging, and blight any prospects of further learning
- older learners need a good level of learning support in their group
- achieving a qualification is a very low priority for older learners and in many cases is actually a disincentive
- very few older learners are interested in returning to the wage economy or in improving their employability through learning
- the minority who are interested in re-entering the labour market have little effective career guidance and support, and are unclear about what skills will be required of them in a new work setting
- some older people are active in promoting social cohesion and social inclusion, and the knowledge and skills they develop through Adult Learning help them do this.

#### **Why are there not more older people developing their Numeracy/Maths skills?**

- The development of Numeracy or anything to do with Mathematics is a low priority for older learners
- there is some possibility of persuading them to develop Numeracy skills if this is situated firmly within the context of learning ICT
- generally, older learners perceive themselves as having number skills that they can apply to solve the problems they encounter in daily life
- they have strategies for 'getting by' where they lack specific knowledge or skills
- some older people live in circumstances that mean they do not have to deal with many problems that involve numerical problem-solving
- older people are not motivated to help their grandchildren with Maths in the same way that they are motivated to help them with ICT
- older people find the terminology used in this aspect of Adult Learning confusing.

#### **What helps older people to persist in learning in general and in Maths/ICT learning in particular?**

- Older learners are helped to persist by patient tutors who can explain clearly and structure learning to meet individual needs; by acceptance, empathy and not being

made to feel stupid; by being able to feel a sense of progress and by recognising that they have achieved; by learning that is structured incrementally, by being able to learn at their own pace, with their peers, by being able to learn in a welcoming and informal environment

- it cannot be assumed that all older people or older learners, even, have access to ICT at home. Thought needs to be given to how to support older learners between lessons, and how to achieve ICT access for them within the community

#### 4f. Online community forum

The original objective of this element of the project was to develop a community of practitioners involved in development work with an online presence on the QIA Excellence Gateway.

##### Evaluation

- The Forum attracted a reasonable degree of interest in terms of 'views', particularly for Curricula and Resources, but not as much active participation/debate as we might have hoped for
- Only 2 of the development projects made contributions to the central project question – how to promote engagement and persistence in maths and ICT learning by older adults. Possible reasons for this are:
  - there was no contractual obligation to contribute
  - we were effectively asking development projects to comment on a topic that was already going to be addressed through contractually stipulated reports
  - many project participants had great difficulty in accessing the forum, due mainly to technical problems with the site itself. One development project manager did not have internet access in her workplace, thus illustrating the 'digital divide' that exists between educational providers, as well as learners.
- The forum may be considered to have had value in the following terms:
  - as a central repository for curricula and other resources as well as other project documents, research findings and reports
  - to give an overview of the project and participant projects to all involved
  - to establish a documentary record of the project for a wider audience on the QIA Excellence Gateway.

##### Some quotations from contributions to the online community:

*“As far as I can see at present, all learners on our project have come for ICT initially and few have opted to go to the separate maths session as well. All are reasonably happy to do numeracy alongside ICT when it is in the same session and shown as a compulsory part of the course provision. In another centre where I work, older learners have come to me for numeracy after spending some time on IT courses; perhaps when they are feeling more confident they are willing to have a go at something they are not too sure of. We are assessing the learners' maths skills in the ICT session, on line or with CD, so it is still seen as part of their ICT learning. The more embedded the numeracy, the more successful I feel we will be in engaging the learners in maths and improving their numeracy skills.”*

*“Ours has been a strong partnership approach, in which the most effective strategy for attracting our target learners to our taster Wealth and Health Workshops (from which we recruited onto Money Magic short courses) has proved to be through trusted and respected financial organisations.”*

*“The workshops themselves took a very softly, softly approach in terms of the maths and ICT offer. The Workshop was offered as an opportunity to access*

*relevant useful financial and well-being information rather than as a 'taster' for a forthcoming course, so no-one felt that they would be under any pressure. However, the range of information, the supportive atmosphere and the trusted services represented did help to create a sense of natural, non-threatening progression for those who wanted or needed it. There was a mix of presentations including healthy eating (given by PCT staff, who also made fruit smoothies), budget planning and management, benefits of the credit union, accessing advice and guidance. There were plenty of opportunities to mix and to discuss personal circumstances or concerns (though no pressure to do so). The timing of the events was set to include a lunchtime buffet and fares were reimbursed as appropriate. Fewer people were bothered about fares, but where it mattered to an individual, it had made the difference between attending or not, but the offer of free food was a definite attraction, as was the opportunity to enter a prize draw. The event offered many learning opportunities and helped people to identify what else they would like to know and what personal skills in money management, maths and ICT they would like to develop. Enrolment onto the short course was then a natural progression at the end of the workshop."*

*"We did do a second recruitment drive through a local community group and targeted their over 50s who had been looking for work at some time and so then engaged some who had little experience of computers and were seriously interested in looking for work. Our project was aimed at getting over 50s back into work by improving their IT and maths abilities and confidence. We did find that many over 50s who are not working are not looking for work and so it has not been easy!"*

**Findings:**

- Recruitment through relevant specialist organisations will work better
- ICT as 'leader' into maths/numeracy
- the effectiveness of well-organised taster sessions as a means of recruitment
- the importance of food in Adult Education!
- the difficulty of targeting/recruiting older learners into provision with employment needs.

#### **4g. Dissemination**

When the project has been completed, articles presenting and discussing its findings will be offered to *Adults Learning, Reflect*, and *Basic Skills Bulletin*. Project team members will also present workshops on the findings at appropriate conferences during the summer and autumn of 2008.

## 5. Discussion of the project's key questions

### 1. What do we know about the Maths and ICT skills of older people?

*'Generally, age was not a strong performance discriminator for either literacy or numeracy. However, there was a tendency for the youngest (16-24 year olds) and oldest (55-65 year olds) respondents to perform at a slightly lower level than those in other age groups, especially in the numeracy assessment.'* (DfES 2003)

The Skills for Life survey (DfES 2003) has given us very full data on the Maths and ICT Skills of the whole population, including those of older people. Its sample size is large, over 8500 in all, and data was collected in age cohorts which included 45-54 and 55-64. The raw data from this survey relevant to the present study is given in Appendix 1. The recent NIACE study (Aldridge and Tuckett 2007) provides information about older people's participation in learning and in their attitudes towards formal qualifications as a motivator for learning. Again the relevant quantitative data can be found at Appendix 1. These figures lead to some very clear conclusions, but the validity of applying these in a particular situation depends on the homogeneity of the populations involved, and one of the key messages of this study is that older learners as a group are no more homogeneous than any other group, and may be even less so (Withnall et al 2004).

With both Maths and ICT learning and skills, there is a clear but complex correlation to the experience of employment over the lifecourse (see for example Bynner and Parsons 2006). There is powerful evidence that ICT skills levels correlate so closely with employment patterns that it seems people's ICT skills may actually tend to diminish if they have a break in employment (Reder et al 2008). In relation to Maths, the Skills for Life survey, notices 'that young men with very low numeracy do not improve these skills as they get older, but those with medium-low, or medium numeracy do improve with age'. The survey's authors hypothesise that this effect is associated with employment: those with even medium-low numeracy may have much broader work options than those with very low numeracy. That is to say, higher than minimum levels of numeracy provide greater access to the job market, which then contributes to the further development of those skills. The survey also notes that this effect is not observed in relation to women, and suggests that this too, may be part of the complex differential association with employment of various types experienced by the different sexes (DfES 2003). It must also be remembered that the extent to which and the ways in which different types of employment involve working with different types of ICT systems, hardware and applications has been changing and increasing in complexity at all times over the past 30 years: this is exactly the period across which our cohort's formal age of retirement is spread out. Older people will on average have had less experience of ICT through work, and therefore significantly less opportunity to develop the relevant skills or to overcome initial resistance to it.

Measuring skills levels is fraught with difficulty. Firstly, the process of measuring skills takes them out of context, which means that someone measured as having low skills in some kind of assessment (particularly if this is a standardised test) may well perform the same operations at a higher level in an authentic context (Nunes et al 1993). Secondly there is an important difference between the actual skills people have as measured through assessments like the ones used in the Skills for Life survey, and the skills they have as measured by counting their qualifications. This point is important to make in the context of this project, because of our finding that older learners are generally strongly

averse to learning that involves formal assessment in the form of tests and examinations, and are also progressively less interested in qualifications as they get older.

Finally, the participation data shows that a very high proportion of older people participating in learning are aiming to improve their ICT skills. This demonstrates that for many older people, ICT can be successful as a 'hook' into learning of some kind or other. Unfortunately, for Maths the reverse seems to be true. A very small number of older people are studying Maths. However, there is some evidence from our development projects that if Maths is embedded authentically in the learning of either other subjects, or in learning how to tackle specific real-life and relevant issues such as financial planning or health, then some learners overcome their resistance to Maths. This may be an argument for promoting the functional benefits of learning at the marketing stage, rather than being explicit about Maths learning.

### **Findings on Key question 1:**

- Older people perform less well than younger adults in Maths and ICT, and this difference increases with age
- at all ages, women are significantly less well qualified than men in Maths and ICT, but the difference is much greater among older people
- based on existing patterns of participation in learning, older people are likely to be attracted by provision which offers them chances to improve their ICT (but not their Maths) skills
- gaining formal qualifications is a motivator for very few older people in their learning.

### **2. What does the literature and current practice tell us about successful engagement of older people in Maths and ICT learning?**

The discussion in this section draws upon the literature review of projects and initiatives; the work of the development projects, and the insights provided by the focus groups as part of the project.

The literature review on relevant projects and initiatives (Bosley 2008) concludes that

*'A key to engaging older people is through working with voluntary and community groups and agencies already known and trusted by them. These groups can enable access, signpost or refer older people to learning provision and provide informal venues for learning delivery. Effective partnerships can be crucial to success.'*

This is not a new idea. It was echoed by the Social Exclusion Unit's Policy Advisory Team on Skills for Neighbourhood Renewal in 1999:

*'We have found that learning delivered at the very local level in a way that is directly relevant to people's needs can have benefits above and beyond any improvement in skills for individuals. Where learning really engages people's interests, it can have a pivotal role in helping communities cohere, to identify what they have in common in terms of both needs and opportunities and to work together.'* (DfEE 1999)

Providers should establish partnerships with other local agencies working with and for older people, especially those for whom education is not their primary focus. The experiences of the development projects confirm this.

The City of Sunderland's Adult and Community Learning Service made use of a wide range of agencies concerned with finance and health to promote its programme of workshops. These included the council's contracted out social housing service (older person's team) and its facilities (one-stop shops and museum). But particularly effective were its relationships with the local credit union, Wearside First Credit Union and with Fiscus, an independent financial advice organisation, which directly mailed personal invitations to members of the public in targeted areas of the city. The voluntary and community sector even contributed to the costs of promotional literature.

To establish its *Moneyfingers* project with residents from four sheltered housing establishments in East Sussex, Digital Unite drew upon relationships it had already built with Amicus Horizon housing. It also made a point of conferring with ERoSH, a membership organisation representing local authorities, housing associations and others working with older people in social housing to try and identify issues that might need to be part of the learning agenda.

The effectiveness of partnership working depends upon the commitment of the respective partners. Neither of the projects described above could have flourished within the timescale set by this project without this commitment. At Calderdale College, staff struggled to recruit learners to their project at North Halifax Skills Centre despite contacting agencies who were already working with older people and learners in the area. Subsequent enquiries as to why this strategy was unsuccessful produced no response. Staff did eventually come across an agency that was willing to help – Halifax Works – but too late for this to have a major impact.

There are messages here about the need to allow time for partnerships to develop before project work begins. Partners need to understand each other's agendas and to be supportive of them. The Calderdale College project co-ordinator also reflects that a tighter focus on who to target as potential partners would have been helpful, given the nature of their project.

The reputation of providers was also a factor in the successful recruitment of learners. If people trust them to deliver a good learning experience, they will sign up for something new and different. Northern College publicised its courses in its short course prospectus, but also recruited from among learners currently on courses at the college. Westcliff Neighbourhood Centre relied entirely upon its standing in the community and its ability to send out information via local networks at a moment's notice.

When Calderdale College staff faced difficulties over their project, they adroitly shifted tack:

*'Databases were obtained of all past, over 50s learners who had accessed previous learning in the centre and all past, over fifties IT learners from other college centres. Letters and fliers were sent out to these 400+ people, and potential learners immediately started telephoning and coming into the centre to apply for the course' – Calderdale College Development Project Final Report*

A small number of the participants in the focus groups also said they **might** be persuaded to try Maths learning if they could be assured that the tutor and the group had the same characteristics as the Adult Learning group they were already familiar with. The 'learning histories' of more experienced adult learners showed that they had already gauged that they could move safely from one area of study to another with their local provider.

Marketing to existing learners has the obvious disadvantage that though it may attract those who are new to a particular area of learning, it cannot reach those who have no experience of structured learning post-16 and who are more likely to have intractable difficulties with numeracy and little experience of ICT.

Local authority providers who have contracted out services have found it important to develop expertise in partnership working with the voluntary and community sector, for instance in order to deliver Neighbourhood Learning in Deprived Communities. Other post-16 providers may have less experience of this. In fact, both strategies

- of recruiting from among existing learners
- of recruiting via other agencies

are important methods of reaching older learners.

In relation to marketing, Bosley (2008) finds that

*'Older people are most likely to be attracted by specifically targeted marketing materials...Older people are not a homogeneous group but vary widely in their interests, skills, circumstances and needs. Designing programmes to attract subgroups with common interests or at a common life stage may be effective.'*

She adds that when it comes to financial capability

*'Financial concerns are often linked with life changes such as ill-health, mid-life planning, retirement or coping after bereavement. Offering taster sessions may be an effective way of attracting older people'*

Feedback from the development projects certainly suggests that any attempt to equip older people who are 'first time' learners with generic skills in Maths/numeracy should be submerged within programmes and initiatives that are constructed around a learning goal that has more immediate appeal, something that will help learners solve a problem or enhance their lives in some practical and meaningful way. Sunderland learners are emphatic on this point:

*'70% of short course learners questioned said they would not have joined a discrete Maths or ICT course: it was the opportunity to get their finances under control which had initially attracted them.'* City of Sunderland, Development Project Final Report.

*'Of Maths/numeracy and ICT, ICT is much the stronger motivator, but for some of the cohort, cooking and eating well may well be more attractive and personally useful'* Project officer, Westcliff Neighbourhood project.

Among focus group participants, distaste was evident where Maths/numeracy were concerned. A collective shudder ran through each group at the mention of the word Maths, and people immediately referred to negative school experiences.

Calderdale learners commented:

*'If you're still trying to recruit, I'd keep the word 'Maths' out of it.'*

*'You can't use Maths in your everyday lives.'*

The term 'numeracy' generally found more favour with some learners as it seemed to have practical connotations.

Providers highlighted the importance of promotional material that accentuated the positive aspects of learning and learners' potential achievements, rather than their past failures. Participants in the focus groups also emphasised that they saw learning as a way of opening up new horizons, 'joining the world of their grandchildren', 'keeping up-to-date', taking advantage of new possibilities, doing things they had never had the opportunity to do before, and so on.

So a formula for promotional materials might be: *'Find out how to do X (e.g. save money), by learning how to do Y (e.g. surf the web)'*. Sunderland suggested that an offer like this might appear more attractive if it came from an organisation or agency which was not overtly involved in Adult Learning.

It is useful to view these findings in the light of recent NRDC research (Swain et al, 2005) on adult numeracy learners' motivations. Although the research participants were very different (the learners in the NRDC study were in "discrete" provision, and their ages ranged from 17 – 64), there are some interesting similarities with our learners. One of this report's main findings was that:

*Numeracy teaching generally becomes meaningful to students when it is related to their own purposes and needs and they can see an intrinsic reason for learning. Accordingly, the meaningfulness of numeracy teaching for an individual is linked to that individuals' motivation for learning. Mathematics does not have to be functional to capture students' interest, involvement and imagination. What makes a piece of mathematics real or meaningful is the quality of an individual's engagement with a problem, rather than, necessarily, its utility or immediate application to their everyday lives. (Swain et al 2005)*

And, like our learners, few attended to gain a qualification or to cope better with the maths they came across in their everyday lives

*Students' motivations for joining, and continuing to attend, numeracy classes are many and complex. However, few of these are related to perceived needs within their current employment, or to students feeling that they have a skills deficit in their everyday life. The main motivations for learning expressed by students in this study were:*

- *to prove that they have the ability to succeed in a subject which they see as being a signifier of intelligence;*
- *to help their children; and*

- *for understanding, engagement and enjoyment.*

*A few students were also attending classes in order to gain a qualification or to cope better with the maths they come across in their lives outside the classroom. However, we found that these are comparatively minor incentives. (Swain et al 2005)*

Bosley's research identifies that it takes several months for any new educational initiative of this type to become well known among its 'public' and established. The managers of the development projects confirmed the difficulties of trying to generate interest and make the necessary arrangements in the lead-in time permitted on this project.

The distribution of promotional material, press releases, interviews with the media need to be carefully timed so that potential learners have enough time to make arrangements to be able to attend, but not so much that they lose motivation. Tutors with expertise and experience appropriate for working with older learners need to be recruited and selected. Suitable venues need to be identified. ICT resources and the necessary technical support need to be arranged. If new ICT resources are being used, then staff need to be trained. If there is to be team teaching, tutors need time together to plan their work. Support workers need to be briefed about their role.

In relation to premises, Bosley found that:

*'Learning needs to be delivered at venues where older people naturally meet and they regard the environment as safe and friendly. Examples of venues include day centres, sheltered accommodation, community and drop-in centres.'*

Issues of accessibility affect more people as they age. All venues need to be accessible either by public transport and/or on foot. They need to have ample, safe parking, to be well-lit and to have access for people with mobility difficulties. Rooms also need to be well-lit to accommodate any learners with impaired vision, and they need to meet health and safety requirements. There will be particular issues to take account of if ICT equipment is being used. Toilets need to be near the classroom, preferably with no stairs in between.

Older people are not necessarily free agents, even if they are beyond retirement age, or not in work. The organisers of the Sunderland provision found it was necessary to take account of older people's caring responsibilities, e.g. for their grandchildren, and that classes had to take place at a time when learners could use their free travel passes.

Naturally, older people are conscious of costs. Participants in the focus groups and in the Sunderland development project rated cost as a factor that they would think seriously about. Thirty-six per cent of the learners who took part in Sunderland's end of course review (14) said that they would not have joined the course if there had been a charge.

Providers need to be creative about course design, and consider offering programmes in a variety of ways, from the short, intensive residential to the longer-term course with regular class meetings every week, to the drop-in arrangement. Bosley mentions the potential attractions of 'taster sessions' for older people, and the taster session followed by a short course is a model that was popular with learners involved with this project. City of Sunderland offered three taster sessions in different locations across the city, followed after an interval by a five week course. There was no obligation on those who attended the

introductory workshop to continue on to a course. However, thirty per cent did, while the majority of those who attended the workshops found them useful in their own right. Digital Unite adopted similar approach, using their first session to ascertain what learners knew about the internet already, and how they might like to use it in the future.

Learners from the Headworks focus group also pointed out that a taster session had been an invaluable first stepping-stone for them, and that without it they would not have started on their ICT course. From the learners' perspective, taster sessions can have the following advantages: they enable them to find out what the tutor for the forthcoming course is like, to take a risk, but not too much of a risk, to find out that they are '*not the only one grappling with this problem*', to get some quick answers to pressing questions, and to start a course alongside people they have already met.

From the provider's point of view, running taster sessions prior to a course can help them identify what knowledge and skills prospective learners already have; identify what prospective learners' specific interests are, and agree the content of the forthcoming course. All of this helps with session planning, the development of resources, the design of activities and knowing what learning support to arrange.

The Westcliff project identified a number of factors as probably contributing to the patchy and dwindling attendance of their learners: many of these are currently being explored through the QIA-funded 'Persistence, Progression and Achievement' project. They include what pattern of provision might be appropriate for people who cannot sustain regular attendance, and how they might be encouraged to persist on a learning journey nevertheless. There was insufficient time to arrive at the answers to these questions.

Engaging learners in course planning is a characteristic of effective programmes. Staff of the Calderdale project adjusted their programme plan several times to take account of learners' stated interests. Staff were cheered to find during the focus group meeting that

*'[Learners] appreciated the friendliness and informality of the sessions and the response to their own requests for the content of the course'* – Calderdale College Development Project Final Report

Bosley points out that evidence of achievement in terms of older learners passing tests or progression is sparse, although there is evidence of changes in the attitudes and skills that enable learning. Certainly, the older learners engaged with this project through the focus groups emphasised that gaining a qualification was a low priority for them. They rated it as the thing they valued least about learning.

Learners at Northern College achieved a NOCN award as a result of their week-end's study, but learners at Westcliff Neighbourhood Centre balked at the word 'assessment'. At Calderdale College, learners undertook assessments related to the national core curriculum for numeracy, but no-one actually took the national tests despite being given the option.

### **Findings from Key question 2:**

- Recruiting from among existing learners and recruiting via other agencies already known to older people are both important ways of attracting older

- people into educational provision in an area of learning of which they have little or no previous experience
- partnerships need to be cultivated over a period of time, in order to arrive at the point where partners understand and are willing to support each other's objectives. Providers need to target agencies with whom they share a common cause, which may be very specific
  - initiatives for older learners, especially those who have little or no recent experience of Adult Learning, need to be devised in ways that help participants solve problems or enhance the quality of their lives in some practical way
  - promotional materials should emphasise the benefits that can be gained through learning, rather than emphasising 'deficits' in the learner
  - providers need to allow several months to reach their 'target' audience and to make the necessary preparations for running an educational project with older people
  - venues for courses and initiatives for older people need to be accessible in all senses of the word. It is helpful if they are venues that older people are already familiar with, use and find welcoming. Working through organisations and agencies whose prime aim is not education will often be desirable
  - courses and initiatives need to be planned to take place at times that take account of older people's personal commitments, such as their caring responsibilities, and their entitlements to free travel
  - courses should be low cost or free
  - taster workshops followed by short courses are an effective means of engaging older people in learning something they have not tackled before
  - it is essential to engage learners in agreeing the course content
  - gaining qualifications is not seen as a priority by older people, and learning programmes directed at them should offer this only as an option.

### **3. How successful is current provision in improving mathematics and ICT skills and in promoting social inclusion and employability through Maths and ICT learning?**

The research conducted within the context of this project (Bosley 2008) found only one example of an initiative aimed at older people which was intended to develop both their Maths/Numeracy and their ICT skills. Although there may be instances of joint Maths/ICT initiatives for older learners happening elsewhere, our experience suggests that these are likely to be few and far between. Our observations and judgements, therefore, are based on what we have been able to deduce from the delivery projects established as part of this overall project, the insights provided by the focus groups and what research shows about the benefits of ICT or Maths learning and of Adult Learning generally.

*'[Social inclusion is] individuals participating effectively in economic, social, political and cultural life.'* **SIPSE (Social Inclusion Partnership of the South East)**

Many older people are aware of the need to get to grips with their finances in later life. There are a number of factors that make this a pressing issue:

- The landscape of personal finance has become much more complex in recent years with, for example, multiple providers of former public utilities endlessly competing for business; the introduction of public services like the Direct Payments Scheme, that

place an emphasis on 'customer choice'; a plethora of financial products' that involve the purchaser in incurring debt, and a shift to on-line shopping and banking.

*'Now that you describe it, I recognise I have come across the Direct Payments scheme. My sister, who is dying of motor neurone disease, uses the one arm that still works and the time she has left to her, advertising for care staff, interviewing them and paying them. Social Services seemed to disappear itself overnight'. Dave, London.*

Changes like these mean that life is becoming more complex for older people just at the time when they might have expected it to become more straightforward.

- At the same time all older people are affected to greater or lesser extent by life-cycle changes - these may include increasing levels of disability, a loss of confidence in one's abilities and the experience of bereavement.

There is a large potential demand, therefore, for courses on financial capability. Of all the applications we received for development projects, despite our efforts to encourage interest in other areas, the overwhelming majority were proposals for financial capability courses. Similarly, when the City of Sunderland, one of the successful applicants, ran three taster days, most of the participants who wanted to take their interests further chose topics that were explicitly about managing their personal finances. Yet few providers offer courses of this kind specifically for older people (Bosley 2008).

It would be a mistake, however, to assume that meeting this demand is a straightforward business. Older people are a highly differentiated section of the population requiring highly differentiated activities and resources to support what might be a generic financial capability curriculum. People's prior educational attainment, recent experience of Adult Learning, level of income and age (pre-retirement, post-retirement, sixties, seventies, eighties etc.) all influence their predisposition to learning and what it is they want to learn.

*'The wide variation in age, needs, interests, circumstances and skills of older people demands: diverse programmes, modes of delivery and materials; flexible entry and exit points and; optional accreditation.'* Carlton et al, 2002

It might reasonably be assumed, for example, that avoidance and management of debt are much more of a priority in areas of economic deprivation, such as Sunderland, than they are in other, more affluent parts of the country.

*'Programmes that are responsive to local needs are likely to attract older people'* (Carlton et al 2002)

While there were elements of overlap in terms of the ground covered by the projects in Sunderland, Calderdale and East Sussex, some of the learning outcomes were highly specific to individuals' interests:

*'A learner wanted to know about using his OAP travel card, and found that from 1<sup>st</sup> April 2008, he can use it in London free of charge.'*

*'Another was delighted to find she could master MS Excel and wasted no time in typing up her 2006-07 accounts using this software.'*

City of Sunderland development project, final report.

*'[I] tried a different insurance company online, and used [it] direct instead of using a*

*broker. I did this after learning about it.'*

Digital Unite development project, final report

While debt was a key issue for Sunderland learners, they expressed interest in issues as wide ranging as life insurance, probate, inflation, water meters and the overpayment of child/working tax credits. As Sunderland's basic skills co-ordinator points out:

*'There is no stereotypical person over 50. Many have single health issues, many have multiple issues, many more are perfectly fit and healthy. Lots are still at work. Many are unemployed but want to work, others are unemployed or retired and have no desire to work. All have a vast amount of life experience and want to have that respected. Most have a working knowledge of the maths they need to function in their lives, or have developed coping strategies but seemingly most might benefit from improving or updating their knowledge and skills. Many have at least some experience of using ICT, some a great deal, others none but (in our workshops) there was genuine interest in learning more about ICT and an openness to try. Where fear was present, it was more generally fear of damaging the computer some way.'*

City of Sunderland development project, final report.

If they are approached sensitively, and through the appropriate channels, it seems many older people will admit to being interested in improving their financial capability. But it is important, as with all Adult Learning, that practitioners are able to sustain learners' motivation by identifying their individual starting points and exactly what it is they want to get out of tuition, and then to provide a relevant response.

An attraction of courses that focus on financial capability is that it is possible for people who experience difficulties with numbers and mathematical thinking to mask these problems. Everyone knows that the world of personal finance is changing at a dramatic rate, and there is no social stigma attached to admitting that you are not quite up-to-date. There is more honour in this than confessing that you don't know how many beans make five. Using computers to access financial information also has more allure for many learners than admitting to numeracy difficulties.

But what do learners learn on financial capability courses? The research warns us against assuming that someone who learns about finance will necessarily develop their numeracy skills:

*'Although interrelated, financial capability and numeracy are different concepts.'*  
(Carlton et al, 2002)

The definition of financial capability offered by the Financial Services Authority also fails to mention the need for numeracy skills explicitly:

*'being able to manage money; keeping track of your finances; planning ahead; choosing financial products; and staying informed about financial matters.'* (FSA 2008).

While financial capability focuses on accessing, assimilating and making judgments about financial products and services, and using numbers, Numeracy/Mathematics focuses on accessing, assimilating and making use of mathematical thinking in order to arrive at judgments. Recruiting learners with undisclosed levels of numeracy skills on to a course

which is not overtly about numeracy, but where these skills will be called upon during the learning programme, presents a real challenge for practitioners. They need to be able to assess every learner's numeracy skills on entry and to provide them with the necessary tuition to be able to improve. Unless they can do this, some learners will not be able to achieve the planned outcomes of the course and will, at best feel that they have succeeded only in part. This inevitably presented challenges given the time and resource constraints of our development projects; meaningful assessment of a wide range of numeracy and ICT skills in a short programme is very difficult, and may tend to swamp the learning activity. Certainly formal initial assessment was not appropriate or possible in all the projects.

The final report from the project run by Digital Unite highlights some of the demands made upon the tutor:

*'The role of the tutor is very important and potentially challenging. He/she needs to be able to:*

- *Understand the objectives and content of the programme very fully and have a good level of numeracy and financial literacy as well as ICT know-how*
- *empathise with the learners and be able to project his/her understanding of their concerns, from the pre-programme engagement process through the whole programme*
- *be able to adapt the content to reflect changes in financial matters (especially in relation to the current financial climate) in a timely manner to ensure that it is relevant to the learners' circumstances*
- *realise the limitations of the advice that he/she can give in financial matters...'*

Despite the challenges, learners reported significant gains. For example, at the end of their *Moneyfingers* course:

- twelve out of fourteen (86%) of Digital Unite's learners, felt that they had learned a lot that they didn't know about the financial information available online
- eight out of fourteen (57%) felt that they had learned more about how to stay safe online
- eight (57%) felt a lot more confident about internet banking and thought that they might use it
- twelve (86%) felt that they learned a lot that they didn't know before about using price comparison websites to get the best deal and
- ten (71%) felt a lot more confident and thought they might use the internet in this way
- ten (71%) felt they had learned a lot more about getting a good deal on savings and insurance.

Comments from Northern College learners included:

*'[I] really liked the quick accessibility of finding out what things mean using the software, eg what APR means. It's quick and easy to see and helps you to understand what they are talking about more easily.'*

*'Being able to learn how to use spreadsheets on the laptop and how it can help with personal money management has been a real plus to this course and something I will now*

*use at home. I also enjoyed using the 'Money Go Round' software because it gave me more confidence in applying my maths skills when looking at money problems.'*

Learners completing Sunderland's taster workshops commented:

*'Debt is not as scary as it initially seems, there is always a way out of it, once you know where to go to get help and advice.'*

*'I will tell other people about credit unions.'*

*'Receiving information about benefit advice has been really good. I will also pass the information on to my relative.'*

*'I thought about how much debt my son is in and how he is going to pay it all. I'm going to pass on the information that I have learnt today.'*

*'The advice around debt management was really good. It can be done. I feel much more confident about tackling some of these issues now.'*

*'I feel much more confident now about talking about debt and money issues. I would never have discussed it before coming here today, I felt too ashamed.'*

67% of learners completing the Money Magic course run by the City of Sunderland planned to continue their studies in related topics (Maths, ICT or both).

On the Calderdale project which, in its revised form, touched on aspects of financial capability, tutors were able to detect that learners made some gains against the criteria of the Adult Numeracy Core Curriculum.

All of these are important gains in terms of economic inclusion, and it is worth noting that in some of the Sunderland examples, learning is likely to have a multiplier effect as learners go off to disseminate what they have learned to other members of their family and community.

Despite our best efforts, we received few applications for development projects focussing on social inclusion or employability.. Ultimately, a project proposed by Calderdale College was approved. This was intended to help learners acquire skills relevant to employment in the retail trade. College staff made strenuous efforts to recruit learners, but eventually had to acknowledge that:

*'Unfortunately, few of the [nineteen] enrolled learners were interested in returning to work.'*

The small number of learners who did have this aspiration

*'were given the opportunity to produce a professional CV and were given mock interviews and Information, Advice and Guidance. They conducted research and were given information on current vacancies.'*

By the end of the course, no employment had been gained, but

*'... a number of learners have a clearer focus for their future plans.'*  
(Calderdale College development project, final report)

With a greater lead-in time and more opportunity to exploit local networks, Calderdale might have had more success in recruiting people who were interested in employment, but there is evidence from our other development projects about similar attitudes to employment among older learners.

Ten learners in Sunderland rated having 'help to get back into/stay in employment' as the least important factor about learning. Only one was actively looking for work, and would take a job if offered. No-one experienced poor health as a barrier to employment. Seven (70%) preferred not to work. One learner aged 47 gave her reason for this as being 'mother of a child. Carer'. The others, aged 68 to 77 years all gave their reason as 'retired'. Only two learners thought that they might be more confident about taking a job or more willing to take one if they were able to brush up their basic skills in English, Maths and ICT.

The older learners who took part in focus groups, rated '*help to get back into/stay in employment*' as the factor they valued least about learning. They displayed no awareness that this might be expected of them at any point, and were clearly on a mission of self-fulfilment, rather than actively seeking work.

*'Retirement is the best thing that ever happened to me.'* (learner, Bensham Grove, Gateshead)

The minority who were interested in re-entering the labour market, for example after being forced to give up a previous occupation through ill-health, seemed to have little effective career guidance and support and were unclear about what skills would be required of them in a new work setting. This small example confirms what the Leitch report has already recognised: that IAG services for adults are unsatisfactory.

The project manager at Calderdale College points to the considerable amount of work and the careful support needed to help older people return to the labour force even when they are inclined to do so:

*'At least two of the learners who stated that they wished to gain work need more support before they are ready for active job seeking. A significant number of those who were interested in gaining employment had health issues, and some learners were unable to complete the course.'*  
(Calderdale College development project, final report)

The development project based at Westcliff Neighbourhood Drop-in Centre in Scunthorpe was a healthy eating project, but after five monitoring and evaluation visits, our project officer made the following observation:

*'There was no evidence that the Westcliff participants were intending to return to work, or even consider doing so... Not only are these individuals not looking for employment, there is also no indication that employers are looking to recruit them or, indeed, are just waiting for them to be upskilled before they do so. So far, the employability needs [of these residents] are only faintly, distantly identified.'* (Project officer, Westcliff)

This project overall, then, has served to illustrate that there is wide gap between what the Government intends in terms of recruiting older people into the workforce and how older people may actually see the situation. While the Government may feel that it needs older people to take up the challenge of becoming paid employees, older people quite clearly have other, firmly held, ideas about how they should be spending their time.

In some localities the breakdown in community cohesion is a matter for concern: support mechanisms are fragmenting and increasing numbers of older people are living at a distance from close relatives who in earlier generations might have provided practical care and moral support. Using ICT is a way of minimising the social exclusion that arises in these circumstances. It is not clear to what extent older people are aware of this possibility. The evidence is mixed:

*'While there is a relatively low level of older adults participating in learning, of those that are, the percentage engaged in studying computer skills is remarkably high.'*  
(Aldridge and Tuckett 2007)

*'Those older adults who are using the internet are using it a lot, suggesting a digital divide within the older adults group as well as between it and the rest of the adult population.'* (Digital Unite, 2007.)

But some current learners are certainly aware of the risk of social exclusion, and they are developing ICT skills to good effect to reduce this risk:

*'I remember my mother telling me a story about her grandmother not being able to read and how, as a child, she had tried to help her. I thought how touching it was that a child should try to do that. And then I realised that the same thing is true for IT and our generation, and that's how young people view us. I decided I would learn IT to avoid the same situation with my own grand-children.'* Bensham Grove learner, Gateshead

A learner in one of our focus groups pointed out how the increasing use of e-technology is changing human interaction:

*'It's reducing the need for everyday social contact, making people like me with no close relatives, even more isolated. Young people are so absorbed with their technological gadgetry that there's less interaction now between members of different generations.'*  
Headworks learner, Gateshead

Sometimes developing ICT skills is embraced with enthusiasm:

*'Access to the Internet opens up a whole new world of news, shopping, holidays – try before you get there – offers ... Without access to the Internet, life is a closed shop...[We want to] join the world of our grandchildren.'* Headworks learners, Gateshead

And learners can see the social benefits. One focus group member described how a deaf friend had been able to expand his network of friends worldwide thanks to the internet.

Sometimes, ICT learning is resented, though:

*'I know I'll have to get one (i.e. a computer) eventually, even though I don't want one ...'*

*Even to make charitable donation, when you've seen a promotional item on the television, you have to go a website to find out how to do it.'* Headworks learner, Gateshead

How ready older people are to embrace ICT as a tool of social inclusion may depend on how 'connected' or 'engaged' they currently feel. Grandparents with families living abroad want are often keen to stay in touch; residents in sheltered housing in Silksworth appeared to want no truck with ICT because of the support already offered by their own environment and the family support mechanisms they already had in place; the woman living in isolation with no relatives was learning because she had no alternative, while a learner who was active in other community groups besides her Adult Education class commented:

*'I wouldn't want to sit behind a computer all day long: it's isolating.'* learner, Bensham Grove Community Centre, Gateshead.

So, although learners have mixed views about ICT and their involvement with it, it is clear that it does play a role in keeping older people actively engaged with the world around them, and that the need for educational provision in this area is likely to increase as current technological and social trends continue.

Numeracy/Maths is not a vehicle for social inclusion in the same sort of way. No-one in our project appeared to be learning Numeracy/Maths because they are interested in fellowship with other human beings, or to find out what other human beings are up to. Numeracy/Maths is the least popular area of study among adult learners (see appendix 1). This is confirmed by a survey carried out by Leeds Older People's Forum's lifelong learning team. Some providers told us what a deterrent any prospect of Numeracy/Maths learning actually was:

*'If we were to do this project again ... I would not include Maths in any formal way, but would signpost anyone who specifically asked for this as part of their progression route to other providers.'* (Westcliff Neighbourhood Drop-in Centre development project, final report)

*'I am inclined to think that the worry of considering Maths was a barrier to some.'* (Westcliff Neighbourhood Drop-in Centre development project, tutor's report.)

*'ICT was the attraction for almost all the learners. They were willing to do the necessary Maths to get the ICT teaching.'* (Calderdale College development project, final report)

Many older learners are aware, though, that any kind of learning keeps them **engaged** with other people in a rapidly changing social infrastructure. In other words, it helps them remain **socially included**, and they value it for this reason.

*'What a lonely life it would be if we didn't have all these learning opportunities. Now that communities are no longer the same [i.e. not as close-knit] they offer a chance to meet with like-minded people'* – learner, Bensham Grove Community Centre, Gateshead

and project reports emphasised the personal and social gains made by learners:

*'One of the common themes for personal development throughout the programme has been the importance for older people to engage in social interaction and this has resulted in a great deal of peer support within the groups. Extrinsic motivation is a key factor to the apparent success of the programme. A prime example of this is a learner over the age of sixty who has mental health problems and has been extremely dependant on his family. During initial assessment the learner felt that he may not have the ability to participate fully in the practical application of the course. This was mainly due to low confidence and poor self esteem. However, as the course progressed, the learner expressed pride in his achievements; he has far exceeded his own expectations by participating fully in each session. He did need support with his numeracy during the preparation period, but has gone on successfully to prepare a budget, which he later transferred to a spreadsheet. This learner was extremely nervous about using a computer and had not even switched one on before yet his confidence improved so dramatically that, when he was asked if he wanted to use the auto sum function (for ease) or actually calculate the formulae, he rose to challenge and not only calculated the formulae to add up his income and expenditure, but then proceeded to work out the formulae, on his own, for his disposable income. Distance travelled for this learner is immense.'*

City of Sunderland development project – final report

Participants in focus groups cited the following as benefits of Numeracy or Numeracy and ICT learning:

- *'I've met different people.'*
- *'I'm less frustrated.'*
- *'I have something to get up for.'*
- *'It's reduced my sense of isolation – I feel included.'*
- *'It's restored my faith in learning – I'm not the only one struggling with this.'*
- *'I've grown in confidence. I'm confident enough to think of investing in a computer.'*

All of these have bearing on learners' perceptions of themselves as people who are **socially included**.

Staying healthy is a precursor to leading an active life and being socially included. The development project at Westcliff Neighbourhood Community Centre, Scunthorpe, focused exclusively on healthy eating and the Numeracy/Maths needed to cook health-giving food. A second project offered a short residential course on 'Healthy Numbers', the Maths found in hospitals or doctors' surgeries, such as the dosage of drugs, body temperatures and vital signs. Neither of these ventures recruited the anticipated number of learners, though both drew on an established clientele.

The Westcliff project was situated in an area of high deprivation where maintaining health on a low budget is of obvious importance. However, numbers declined steadily throughout the course until, from fourteen starters, only two participants remained, one studying ICT and one studying cookery. The project officer makes the following pertinent observations:

*'Just running the centre is a substantial challenge, closing times often being delayed by objects being jammed in the electronic shutters. The arson attack on the building with the cookery facilities came when the building was occupied by a group discussing its future. Neighbours alerted the fire service when they saw youths*

*pushing lit, petrol-soaked papers through the letter-box, and smoke coming from inside the building.'*

*The project objectives were succinct and thorough. Provision was in place to meet them all, but far from all were met ... Numbers dwindled. Local knowledge suggested that this was not an unexpected response: people had other priorities, other demands on their time, which did not adapt to the requirements of regular attendance.'* (Project officer, Westcliff)

Despite the challenges, learners made obvious gains, particularly in relation to cookery and their knowledge about food substances:

*'I would like to increase my knowledge of how to use herbs in cooking: they smell good. I hadn't realised how much salt was in dried soups, and that herbs are a good alternative for salt.'* – 52 year-old white female

*'I don't cook much so any skills I learn here will help me.'* – 60 year-old white male

*'The vegetable lasagne is very easy to make. I will make it at home and make it last for two days, as I live by myself.'* – 64 year-old white female

*'I haven't eaten quorn before, but I think that it's better than mince you buy in the supermarket.'* – 52 year-old white female.

The project researcher points out:

*'Of Maths/Numeracy and ICT, ICT is much the stronger motivator, but for some of the cohort, cooking and eating may well be more attractive and more personally useful.'* – Project researcher

At Northern College, the learners were recruited via the college's short course booklet and from learners on other college courses. Eight learners enrolled. Numeracy was a prominent aspect of the course right from the start. Learners found the practical activities they did enjoyable and felt by the end of the week-end that they had made good progress with topics such as metric measurement and the use of graphs and spreadsheets.

We can only hazard a guess as to why the attitudes to numeracy differed so widely between the Westcliff and the Northern College learners, especially as the tutors at both establishments took a similar approach – founded in practical and relevant activities. It may be that the more experienced learners at Northern College were ready to try something demanding in what they knew would be a safe environment.

Certainly, the residential course did not, ipso facto, face the challenges of attendance and persistence experienced at Westcliff. In such demanding circumstances, in exactly the sort of community the Government wishes to target through its social inclusion strategies, the evidence suggests that sustained learning is difficult to achieve without an intensive, well-resourced and painstaking process of community development.

One of our expectations was that if providers were committed to helping older people become or remain politically included, Maths with ICT provision would be being used as a vehicle to help learners develop the knowledge and skills associated with active citizenship, for example:

- accessing information about local authority services and the democratic process
- developing the skills to be able to manage community assets and to lobby for additional resources for specific community groups
- researching and establishing on-line communities with other like-minded people.

We found no evidence of this anywhere in the course of our researches, and only two of the project applications we received, both set in the context of sheltered accommodation, touched on this theme. Gorard and Selwyn (2008a, 2008b) confirm that older people, like people in other age groups use ICT for limited purposes.

*'The stereotypical notion of the 'silver surfer' using the internet for banking and finances, shopping and dealing with government agencies was not in evidence. Instead, the minority of older adults who use computers do so for word-processing, keeping in contact with others, and generally teaching themselves about using the computer' Gorard and Selwyn (2008a)*

Gorard and Selwyn take issue with the view that 'ICTs' unproblematically enhance older adults' quality of life. They argue against the perspective that:

*'ICTs impact positively on almost all areas of old age, having the potential to improve access to social services, facilitate social contacts and independent living, as well as access to context-based leisure and information.'* (see for example Help the Aged 2007)

They suggest, by contrast, that ICT tends to help those who need it least, and that the benefits of ICT may be 'a self-fulfilling prophecy'. The importance of this argument is that it recognises the complexity of the ways technology interacts with people's lives, and cautions against simple 'quick fix' analyses based on convenient stereotypes. They suggest that:

*'Older adults' non-use of ICT is not simply about advanced age and lack of technological know-how per se. Instead it hinges more on the circumstances often associated with being old – for example, lower income, impaired physicality, narrowing social circles as well as the politics, cultures, and personal preferences of old age.'* Gorard and Selwyn (2008b)

None of the development projects explored the type of initiative exemplified by 'Saga Zone', the social networking site developed by Saga specifically for older people. The Digital Unite development project encouraged learners to use Facebook as a means of keeping in touch, but learners were not keen to do this, preferring to wait for face-to-face sessions with their tutor.

### **Findings from Key question 3:**

- Financial capability programmes are attractive to older people, but are not widely available. Such provision promotes economic inclusion in that people learn to access financial information, make more discriminating choices about products and services and manage their own affairs more effectively.

- ICT programmes are successful in attracting older learners, for social inclusion and financial capability purposes rather than for employment. Older people are attracted by courses that offer the opportunity to learn ICT skills rather than numeracy skills. They enjoy using the internet within the context of financial capability courses.
- To help those learners who have low level numeracy skills to improve them within the context of financial capability provision, practitioners need:
  - the time, knowledge and expertise to be able to carry out sensitive and extensive initial assessment
  - the time, expertise and staffing levels to be able to provide tuition that is appropriate in nature and relevant in content.
- There is wide gap between what the Government intends in terms of recruiting older people into the workforce and how older people themselves may actually see the situation. Many older people do not want to return to employment. In the case of people below retirement age, this may be because they have developed alternative lifestyles which may include caring for others. In the case of people above pension age, there is still a strong sense that they have 'earned' their retirement and intend to use the time available to them for their own purposes from which they do not wish to be diverted. This project could not make any dent on those perceptions.
- ICT learning for older people furthers social inclusion, and some older people are actively using it to minimise the risks of social exclusion. The demand for this provision is bound to increase as present technological and social trends continue.
- Adult Learning, generally, is a vehicle for social inclusion and this is one of the reasons it is particularly valued by older people.
- Learning programmes that focus on healthy living can be attractive to older people. They have a place within initiatives aimed at achieving a better quality of life for residents in socially and economically deprived neighbourhoods. Numeracy can be broached with learners as a part of such programmes, but in most cases it is likely to be the issue of health rather than improving their numeracy skills that attracts and motivates learners.
- While healthy living programmes for older people can contribute to the regeneration of deprived communities, they are unlikely to flourish without a sustained and intensive process of community development, where workers have the opportunity to explore how best to engage and maintain people's interest.
- There are no specific incentives for providers to make provision specifically for older learners, or to recruit them to other provision.
- Older people do not appear to be strongly interested in 'high-level' digital technology such as participation in online communities or digital networking. Using email for communication with family and friends, is a much more popular reason given for wanting to improve ICT skills.

- There is no indication that employers are waiting to recruit older learners if and when they have acquired appropriate qualifications and skills.

#### **4. Is combining Maths and ICT learning a suitable strategy for furthering the social inclusion and employability of older people?**

*'It is worth remembering that if we as teachers find it difficult to get our heads round TEACHING two subjects at the same time, we need to keep focussed on the extent to which we are asking someone to LEARN two subjects at the same time, and make sure we are not giving our learners something else to fail at.'*

(Tutor quoted in Kambouri et al 2003)

Our reviews of relevant literature found very few examples of projects that combined Maths and ICT learning in the context of older people. Millar and Falk (2000) reported on a project that investigated the interaction of literacy, numeracy and computer use among people aged over 55 in rural Tasmania, and the potential of Online Access Centres for developing their literacy and well-being. Online Access Centres are community-managed and located in libraries or on school sites, and were set up to improve Internet access for all age groups. During each centre's first year, users received free computer and Internet training from volunteers, who were usually trained to deliver this service. Users could also access some online learning packages. Users reported an increase in confidence in their numeracy skills and a greater awareness of their potential for learning.

There have been more development projects looking at the effects of combining financial literacy learning and ICT, though few targeted at older learners. One example is E-finances for Over 50s, delivered by Coventry Adult Education Services as part of the FLOP (Financial Literacy and Older People) Project, helped learners from three ethnic minority groups to develop skills in financial transactions using the Internet, credit cards, PINs and Internet banking (DfES 2005). This E-finance course was delivered in two-hour sessions over an 8 week period. Most students did not have previous computer experience. Mentors rather than adult educators provided students with support. Carlton et al (2002) in an overview of work combining financial literacy with ICT suggest that the increasing use of ICT for financial services could exclude some older people, but that the same medium could enable access. Another commentator (Vitt et al 2005) concludes that Internet-based teaching methods have increased the availability of financial education, but that it would be more effective if combined with face to face teaching.

Many more projects report on combining Maths and ICT learning for adults in general. Kambouri et al (2003) do not focus particularly on older learners, but make a strong case for the use of laptops to support learning with marginalised or hard-to-reach groups, in relation to both numeracy and literacy learning. They report that 'laptops attracted men and women of all ages', and give examples of materials used successfully to combine ICT learning with the Skills for Life numeracy curriculum standards.

The recent NRDC publication (Coben et al 2007) on the effective teaching and learning of numeracy found that almost all learners improved their skills and confidence, and that learners' attitudes were more positive at the end of courses, with the changes tending to be greatest for older people. This study surveyed 412 numeracy learners in 47 classes taught by 34 teachers. There was very little use of ICT by the teachers in this survey. A

parallel NRDC publication on effective teaching and learning of ICT (Kambouri et al 2007) does not reference numeracy learning combined with ICT, though this is planned for a future publication. It does report that older men (but not women) acquired more skills and confidence in ICT as a result of their learning, than younger learners.

The MICTOL Development projects all combined ICT and numeracy learning to some extent, but with different emphases. For example, Northern College's 'Maths-led' development project aimed to blend ICT seamlessly into their short courses on Managing Money and Healthy Numbers by using a 'mobile classroom' consisting of laptops. Specific examples of IT activities included:

- Google calendar tasks – making appointments online then writing up task sheets for assessment
- 'Guess the angle' drag and drop activity
- Spreadsheets: collect personal data on height, heart rate, for example, and use Excel to produce charts and graphs of the group.
- Spreadsheets: exploring setting up formulae, including conversion rates between Fahrenheit and Celsius.

The learners were positive about the blended approach:

*'I really liked the quick accessibility of finding out what things mean using the software, eg what APR means. It's quick and easy to see and helps you understand what they are talking about.'* (Learner, Development Project)

All the learners on this project reported that their skills and confidence in Maths and ICT had increased as a result of the courses.

Digital Unite's development project combined ICT learning with financial literacy, and to a lesser extent, the teaching of numeracy skills. The course design combined group sessions with one to one or one to two tutorials. It used 'webquests' set for homework, and also set up a community on Facebook. An important problem identified for combining Maths and ICT through financial literacy learning with this group is that many learners are very concerned about security in relation to online financial transactions and personal information:

*'While the information provided by the programme helped to give them more confidence, they are right to appreciate that there are significant potential risks to personal data when online systems are used. A major risk arises when a shared computer is used as it is very easy for someone to fail to log off properly or to inadvertently save a password or other access control data on the machine. For this reason the Module on Internet banking specifically avoided helping the learners to set up an account. However, it may be frustrating for learners who wish to use Internet banking after seeing the demonstration, and are then advised not to do so.'* (Digital Unite: Final Development Project Report)

The Westcliff Development Project attempted to combine ICT, Maths and a Healthy Eating cookery course. Because of the difficulties their learners had in attending consistently, they concluded that it would have been better to run the courses separately, with their content linked, for those who could manage to attend both at the same time. In particular, this project found that their learners preferred not to be expected to attend for the whole of one day.

The Calderdale Development Project aimed to deliver an ICT/Maths/Job Search programme to 19 learners. The programme schedule as adjusted during the course in order more fully to integrate the Maths and ICT learning. They offer the following advice to practitioners:

*'Embed the Maths! Maths/numeracy session still do not attract learners who often have prior negative school experiences; embrace the idea that learners have got through life so far and know what they need.'* (Calderdale College Final Development Project Report)

The report adds that the Maths should be individually relevant to each learner, and that ICT was the attraction for almost all the learners. They were willing to do the necessary Maths to get the ICT teaching, but the opportunity could have been used more effectively by double staffing and greater embedding.

The Sunderland City College Development Project found that 70% of learners in their programme said that they would not have joined a discrete Maths or ICT course: it was the opportunity to get their finances under control which had initially attracted them. This suggests that strategies to engage older learners in Maths and ICT may need to relate directly to problem-solving or enhancing their lives in some practical and meaningful way. They conclude, like the other projects, that practical relevance is crucial:

*'Don't introduce ICT into sessions just for the sake of it. Make certain that it is relevant to what is being learned and/or that it will enhance teaching and learning. Some of our learners had difficulty reading from the portable interactive whiteboard due to eyesight problems and the way the light fell on the board. Many learners were more comfortable with low-tech methods of teaching and recording even though they were happily learning how to use ICT themselves.'* (Sunderland City Council Final Project Report)

Summing up, there is some evidence that there are positive effects on learning and motivation, particularly in relation to Maths, in combining ICT and Maths learning within programmes. The potential for ICT-led programmes for attracting older learners in general is obviously strong, and, provided it is supported well enough, and seen as relevant, Maths learning can be introduced with success, into such programmes. However, the funding system, at least as it is interpreted locally, may not encourage combined programmes: one organisation considering applying for a MICTOL Development Project told us that their local Learning and Skills Council actively discouraged these two things being taught in tandem, because they were funded differently.

#### **Findings from Key question 4:**

- Combining Maths and ICT in programmes of learning for older people can be effective, though the 'hook' should generally be the ICT rather than the Maths.
- Programmes need to be organised around real-life activities and tasks faced by older people: topics such as financial literacy or health can be highly effective because the learning is relevant and applied. Improving Maths and/or ICT skills is in this context a by-product. Specific knowledge (for example about preventative health measures) gained in such programmes is also likely to spread informally for the benefit of wider communities.

- Combining Maths with ICT programmes addresses that fact that older people seem to be unwilling to join Maths programmes, and also avoids the apparent ‘deficit’ approach implied by programmes specifically dealing with Maths skills.
- Combined Maths and ICT programmes for older learners are unlikely to make a significant contribution to the *Skills for Life* numeracy targets.
- Teachers working on integrated Maths and ICT programmes are very likely to need training in the subject in which they are not already qualified and experienced. Double staffing may be an alternative, but would be expensive.

##### **5. How can older learners be supported to persist and progress?**

The focus groups set up by the project were asked what factors they thought helped older learners persist in learning in general and in Maths/ICT learning in particular. It is clear from their answers that the way the teacher behaves is a key factor. One group described their Maths teacher as excellent, saying:

*‘She has a straightforward approach, is easy to understand, gives simple explanations and has infinite patience. She never makes you feel you should know, even if you have done stuff already and can’t remember it – it’s hard to remember stuff if you haven’t got a computer at home. She’s non-judgmental, able to work with people with different levels of prior learning.’* (Headworks Focus Group)

Others spoke of the importance of learning new skills, and of a sense of achievement, in supporting persistence:

*‘I’ve never done a spreadsheet till this morning, and I managed to finish one.’* (learner, North Halifax Skills Centre)

*‘I’ve learned new skills, like using the spell-checker to help my grand-daughter with her homework.’* (learner, Headworks group, Gateshead)

Others spoke of being able to learn at your own pace, being able to learn with other older people, small class size, and a relaxed learning environment, and these points were echoed by learners in the development projects, and by evidence from the literature review on projects and initiatives.

This review echoed the importance of effective teaching and learning in relation to learner persistence and progression:

*‘Many effective teaching practices are applicable to all adult learners, although good practices may be particularly important when working with older people. Ways of promoting learning include: linking skills development with the interests and needs of target groups; taking account of learners’ preferred learning styles; using a variety of activities and resources; structuring, reinforcing and consolidating learning... Older people often appreciate practitioners who are supportive, patient and aware of their needs; learning with their peers; short, slow-paced sessions; repetition of key learning points; and adaptations to the environment and equipment to meet their sensory and physical needs.’* (Bosley 2008)

Bosley goes on to suggest that where progression is limited, this may be a consequence of other challenges such as limited teaching and learning resources, the difficulties of integrating ICT into numeracy teaching, and limited practitioner experience of working across both subjects. When these positive factors were present, she argues, changes in the skills and attitudes that enable learning, such as increased confidence, motivation, concentration and autonomy, were evident.

Another central issue for progression and persistence is the specific types of learning support that may be needed by older learners. The diversity of older people, the relatively high incidence of disability and that likelihood that learners have been out of formal learning for a long time means that older learners are likely to need higher levels, and more different kinds, of support for their learning. For example, in one group of 8 learners in one of our development projects, one had had a stroke and was hearing impaired, another had Parkinson's disease, at least three were known to have experienced mental health problems, and two had never used a calculator before. This suggests that initial assessment is a complex process that needs to be carried out sensitively over a sustained period of time, that expert learning support of various kinds needs to be available, and that some learners may like to learn at a slow pace with plenty of opportunity for reinforcement. Team teaching can offer solutions to this (as with the Sunderland Development Project). On the other hand, Digital Unite offered tutorial support to reinforce what had been learned in class, and participants valued this.

The Digital Unite Development Project also found that 'although people are keen to participate in a programme and clearly enjoy it, they have limited motivation to do 'homework' exercises between sessions. In relation to persistence in the use of ICT hardware and applications, they also found that *'ongoing support is essential. While web-based systems, such as social networking websites, can facilitate this, there is no substitute for a real person to answer questions and provide help.'* (Digital Unite Final Development Project Report)

The Calderdale Development Project found that the age of the teachers was a positive factor. The learners *'appreciated the fact that the teachers were all mature, like them. Two out of five tutors were over 50, and the others all over 35!'* This project also highlighted the importance of designing the lessons to suit the learners. The initial sessions asked the learners to identify what they wanted to learn, and the schemes of work were produced from that. This helped the learners to see the relevance of the work they were given. They found that it would have been helpful for the teachers to meet together on a weekly basis, to pick up issues and deal with difficulties as they arose, but this wasn't possible.

The Northern College Development Project emphasised formative approaches to teaching and learning, involving collaboration via group and pair work:

*'This involves using active learning and collaborative approaches throughout, as evidence shows learning through discussion maximises opportunities for learners to make connections and build on their existing knowledge of the world.'* (Northern College Development Project Report)

For the Westcliff Development Project, situated in the middle of a deprived housing estate, it is clear that running the centre requires persistence:

*'Just running the centre is a substantial challenge, closing times often being delayed by objects being jammed in the electronic shutters. The arson attack on the building with the cookery facilities came when the building was occupied by a group discussing its future.'* (Project officer's notes)

For the learners on this project, regular attendance was not something they found easy, but most of the factors involved were outside the control of the teachers or the project manager. In situations like this, drop-in provision may be more effective, though this brings with it other difficult issues, such as funding and achievement:

*'While from a provider's standpoint a learner may appear to be irregularly engaged in learning, from a learner's perspective periods of formal provision sandwiched by breaks of self-directed study or even no study at all may be natural and logical components of a lifelong learning journey.'* (NRDC 2008)

The NRDC's research briefing identifies a range of strategies that can encourage learners to persist, whatever their age:

*'Teachers, support staff and managers need to be aware of the complex lives led by most learners, and of the positive and negative forces that support and hinder persistence. Positive forces include sponsors/mentors, learner satisfaction, goals, effective pedagogy, and learner-centred organisational cultures. Sponsors – individuals in learners' social networks who support them, either directly in their education or indirectly, eg through providing childcare, have been shown to be particularly important in encouraging persistence.'* (NRDC 2008)

The NRDC report also emphasises the importance of clearly identified learning goals as a factor in supporting learner persistence:

*'Setting and revising goals also helps improve persistence. Practitioners should help learners to identify goals and the steps necessary to achieve them, and learners should be encouraged to measure their progress along the way. For practitioners the challenge is to match the learning activities to learners' interest, needs and goals, and then to engage in continual dialogue with learners about their progress'* (NRDC 2008)

In more than one of the development projects, learners said that not having to take a qualification was a key factor in their continued persistence: in one project 90% of students said that what they most valued about learning was 'not having to take a qualification' (Sunderland City Council Final Development Project Report). Other evidence from the City of Sunderland project suggests that once, engaged and motivated by enjoying the course, and by gaining confidence and achievement, older learners would be happy to access discrete courses in Maths or ICT. This might appear to contradict findings elsewhere that older learners are deeply unwilling to study Maths, but most of the development projects provide evidence that once they are engaged in the first place, then provided the course satisfies the key factors listed above, then older learners may be willing to take on the challenge of unpopular subjects like Maths.

## **Findings from Key question 5:**

- Teachers need to be expert teachers of adults, and use appropriate pedagogical approaches for working with adults in general. This includes supporting learners to identify clear learning goals and to engage in constant dialogue with them about their progress
- teachers need also to be aware of the issues involved in working with adults who may be participating in learning for the first time since leaving school, and who may have had negative experiences there
- older learners in particular are more likely to persist and progress in learning situations characterised by familiarity and trust between the participants
- older learners in particular tend to object to pressure to take qualifications: many have negative feelings about any kind of formal assessment process. Older learners like most adults prefer to feel they can progress at their own pace
- older learners may prefer to learn with their own peers: these can act as mutual sponsors and support persistence
- few teachers are confident teaching both Maths and ICT, and in combined programmes tend to under-emphasise one or other component. For combined provision, specific training and professional development is needed
- some learners become adept at developing their own learning pathways, based on moving from interest to interest as limitations on enrolment or on the constraints of the funding regime. This results from providers constantly having to move learners on and recruit new ones, as a condition of funding.

## **6. How effective is current policy in promoting social inclusion and employability for older people through Maths and ICT learning?**

### **6.1 The ageing population**

Post-industrial countries in Western Europe face similar challenges arising from the fact that their populations include increasing numbers of people aged 50+ years, and a higher proportion of older people in the workforce. The key issues relate to:

- potentially rising expenditure on health care
- increasing expenditure on old age benefits
- insufficient numbers of skilled workers across the age range to maintain economic success.

The solutions, put forward as policy, are primarily concerned with:

- improving physical and psychological health
- maintaining employment among older workers
- promoting the re-entry of older workers into the labour market
- increasing the pension age so that benefits are claimed later
- revision of state and private arrangements, in order to enhance personal income after retirement. enhancing personal income (the main aim of the Turner Commission and current UK legislation).

In response to this broad agenda, the Government has continued with its development of anti-discrimination provisions, protecting the 50+ cohort from disadvantage in employment and training. The Employment Equality (Age) Regulations 2006 prohibit age discrimination in employment and vocational training. They apply to individuals of all ages

in work, seeking work or looking to access vocational training; to all employers, and to all providers of vocational training and vocational guidance (including further and higher educational institutions). This legislation guarantees equality with other learners but does not drive any provision specific to the needs of the 50+ cohort.

## 6.2 The transnational perspective

**The Organisation for Economic Cooperation and Development (OECD)** - At a European level, the OECD is influential in shaping policy. In its 2004 report *Career Guidance and Public Policy - Bridging the Gap* the OECD considers the employment implications of ageing societies:

*'Many countries are concerned about their ageing population and the problems this is increasingly posing for increased health and old age security expenditure. To relieve the pressures on public resources, policies are being developed to maintain employment among older workers and promote their re-entry into the labour market. This can be linked to encouraging more flexible approaches to managing the transition to retirement. It can also be linked to encouraging those who have left the labour market to continue their involvement in learning and in voluntary work in the community, so reducing health bills and harnessing their social contribution.'*

The OECD also suggests that inclusion and employability through learning should be targets across Europe, and that nations should maintain contact and seek out best practice. However, policy responses to ageing societies in most OECD countries have, to date, largely focused upon reforms to retirement age provision and reformed income support arrangements. To date, no evidence has emerged of the advice regarding target-setting and identification of best practice being followed.

**The European Social Fund (ESF)** - It is clear, however that the ESF organisation has attempted to promote the social inclusion and employability of older people through the experience of learning. The ESF's statement *Framework and political priorities: June 2005* is shaped by European Council regulation No 1260/99, which advocates developing labour market policies to:

- combat and prevent unemployment
- avoid long-term unemployment
- facilitate the reintegration of the long-term unemployed and
- support integration into the labour market of young people and persons returning to work after a period of absence.

These aims are to be achieved through

- promotion of equal opportunities for all in terms of access to the labour market, with particular attention to persons at risk of social exclusion
- promotion and improvement of vocational training, education and counselling in the context of a lifelong learning policy
- promotion of a skilled, well-trained and flexible workforce, innovative and adaptable forms of work organisation, and entrepreneurship

- specific measures to improve access and active participation of women in the labour market (career prospects, access to new job opportunities, setting up businesses, etc).

The ESF's commitment to this agenda is demonstrated through many of the projects it co-funds. Powerful examples of these projects are set out in the Executive Summary of the Equal Transnational Partnership Report *Ageless at Work 2007*, which includes a report on the LSC Berkshire/Age Concern Training 'Tick-Tock' project. The ESF stance and the nature of its activities do illustrate, however, a common tendency to conflate the notions of 'social inclusion' and 'engagement in the labour market', and the assumption that it is only through the latter that the former can be achieved.

### 6.3 UK policy

In similar vein, policy in the UK has historically been driven by concerns about the 'pensions crisis' and more recently about skills shortages. The Government is seeking to manage the situation by making changes to the arrangements under which pensions are funded and poorer pensioners are supported. In the UK there is a long history of legislation providing for additional state pensions relating to income, and of encouragement to develop private pensions, through company or other schemes. The retirement age for women is being levelled to 65. This approach can reduce the amount of supplementation from public funds required to ensure that all retired persons have a minimum amount on which to live.

Attractive enhanced pension rates are now being offered to those who choose to defer their retirement beyond state pension age. But what can individuals do during the period of deferment? To many the obvious answer is that they should continue working, contributing to the economy by paying taxes (though not standard national insurance contributions), and building their own pension resource. For others they can provide a resource to the economy through cascading their skills and experience to younger cohorts, by becoming involved in learning opportunities but also by continuing in paid work. The work of CROW, based at NIACE, demonstrates clearly that older people (in general) like work, and would like to work longer, but that they often feel forced prematurely out of the labour market by discrimination, poor job design, and ill health. They value work for a range of reasons, including intrinsic interest and sense of purpose, the ability to use skills and knowledge acquired over a lifetime, social status and self-respect, and social engagement with colleagues and workmates, customers and partners. For a substantial number, continuing to work is also a financial necessity, although in surveys older workers' typically place money relatively low on their list of motivations. This confirms research findings on the relationship between work and health for the population as a whole (Waddell and Burton 2006). However, as the literature also demonstrates, work can also lead to negative impacts (see for example Hill et al 2007, Griffiths 2007), especially if it is poorly managed and organised.

In some economic contexts, particularly if there were high levels of unemployment, extending the working life would present problems. That is not the case at present in the UK. Rather, the evidence suggests shortages of both labour and relevant skills. Skills needs are identified, of course, across all ages and groups, but logic suggests that both shortages could be met by delivering skills to the 50+ cohort, both employed and unemployed. There is widespread agreement that learning can bring economic benefits, and although the wider benefits of learning are also acknowledged, policy statements are

often expressed in terms that focus solely on the economic aspects, or treat these as a priority.

As an example of this, the ESRC's website '*Older People and Lifelong Learning: Choices and Experiences*', says:

*'Although older learners are now receiving more consideration in relation to the development of national and local lifelong learning policies, our study shows that lifelong learning needs to be inclusive and to be understood in the historical and social context of learners' lives and situational influences and their impact on later life learning decisions. It is also important to acknowledge older people's varied perceptions of what constitutes learning, the considerable quantity of informal learning they appear to undertake in later life, and the place of learning, both formal and informal, in helping to ensure a good quality of life through intellectual stimulation and enjoyment. . . there are challenges here for Learning and Skills Councils and other organisations concerned specifically with older people in devising more accessible, inexpensive and relevant opportunities for older people to learn.'*  
(Research Findings 13, from the Growing Older Programme, December 2002)

We know, however, that there has been a significant decline in the number of older people participating in Adult Learning in recent years because of the focus on Level 2 qualifications and Skills for Life achievements, and the reduction in government subsidy for the type of learning opportunity likely to attract older people.

Historical tensions over the emphasis in policy are not fully resolved, but employability is increasingly seen as central to social inclusion, and more recently, the body of policy statements focusing primarily on employability and engagement in the labour market has steadily grown. Four key examples are given below:-

#### **Welfare to Work: Tackling the Barriers to the Employment of Older People (NAO 2004)**

The National Audit Office (NAO) was asked to look at the issues around employment and older people, resulting in its report *Welfare to Work: Tackling the Barriers to the Employment of Older People*. This drew on a wide range of stakeholder sources in reaching its findings and appears to have done much to shape the consequent consultation and the Skills White Paper:

*'People aged over 50 experience a wide range of barriers to employment. These include barriers with a strong association with age, such as age discrimination.*

- *There are benefits in an economically active older population*
- *There are benefits for the individual and for employers*

*For many older people, early departure from the labour market or failure to get a job can lead to increased poverty, insecurity and social exclusion. This in turn can lead to disillusionment, depression and ill-health. Of those aged between 50 and state pension age who are out of work, most are reliant upon the state; only one in three receives an income from a private pension.*

*There is also evidence that those who work beyond state pension age are healthier and happier than those not in employment. There is a strong correlation between income and health: the median income for those aged 50 to 59 reporting excellent*

*or very good health was found to be nearly three times higher than those reporting fair or poor health.'*

Examples are given of two large employers who have benefited from increasing the number of older employees:

- *'The Nationwide Building Society increased its recruitment age limit and saved more than £5 million in costs because of reduced staff turnover.*
- *B&Q's Macclesfield store, staffed entirely by people over the age of 50, achieved 18 per cent more profit, 39 per cent less absenteeism and significantly lower staff turnover than benchmarked stores when research was conducted in 1991.'*

There are also some arguments for change based on economic estimates:

***'£16 billion:*** *The reduction in older people's employment is estimated to have reduced the output of the economy by as much as 2 per cent, which represents about £16 billion a year. This estimate is based on changes in retirement patterns and two-thirds of early retirements being involuntary. Reduced employment rates lead to growing public spending pressures in terms of extra benefits and lost taxes, estimated to be £3-5 billion a year.'* (Winning the Generation Game, Cabinet Office 2000)

***'£31 billion:*** *This estimate assumes that of those who are unemployed or inactive 790,000 might take-up an offer of employment and that 280,000 people over 65 would like to work. The number who might like to work was then multiplied by average GDP per employed person.'* (Ageism too costly to ignore, Employers Forum on Age 2000)

***'£12-30 billion:*** *Modelling work estimates the underemployment of some 430,000 older people who match the profile of those who are working in terms of age, qualifications and health, costs £12 billion a year in lost GDP. In addition to this, a further 580,000 people who do not match the profile of those currently working, would like to work. For some this is not a realistic prospect, but if the barriers they currently face were dismantled, this group could add a further £17 billion to overall output.'* (The economic contribution of older people, Meadows 2004)

There remain unresolved issues about how to make robust estimates and modelling assumptions on which policy can be safely based.

### **Opportunity Age - Meeting the challenges of ageing in the 21st century, 2005**

The Government's intentions were clearly expressed in the consultative paper *Opportunity Age - Meeting the challenges of ageing in the 21st century*, 2005. This paper addressed learning, employability and inclusion as strategies to promote active ageing from a cross-departmental perspective:

*'Reducing levels of inactivity in the economy at all ages is the most effective way to offset the impact of future changes in the age structure of society. Our aspiration is to achieve a world-leading employment rate of 80 per cent, including a million more older workers. If we achieve this, the ratio of workers to non-workers in the*

*economy would be about the same in 2050 as it is now. Society can thus grow older, and sustain its economic capacity . . .*

*We have taken steps to make it easier to choose to work longer, by informing people about their choices in planning for retirement and by offering flexible options. We are making it easier for older workers to access the support they need to take informed decisions about their careers, skills and providing for retirement. Our Skills White Paper will reinforce the attention employers pay to reskilling older workers and improve training support.*

*Helping unemployed and inactive people over 50 into jobs is a key priority for government investment. Employers need to invest in the skills of older workers to remain competitive. We will continue to develop our range of active employment policies to help tackle the barriers that unemployed and inactive people aged over 50 face in returning to work.*

*There is good evidence that older people can benefit substantially from continuing to learn and gain new skills as part of a fulfilling and active retirement. For example, 80 per cent of learners aged 50–71 reported a positive impact from learning in areas such as their enjoyment of life, self-confidence, and their ability to cope with events such as divorce or bereavement, while 28 per cent reported an increased involvement in social, community and voluntary activities.'*

Some of these aims and priorities were apparent in the *Leitch Review of Skills: Prosperity for All in the Global Economy* (Leitch 2006). This picked up the themes of ensuring that older people should work longer and should upskill to do so. The Government has set an aspiration for raising labour market participation rates to 80 per cent. Given the fact that participation rates among people below 50 are already high by international standards, it is clear that this can only be achieved by significantly improving participation among people over 50. Achieving the 80 per cent 'aspiration' must therefore involve improving the retention in the workforce of people who would otherwise leave, either before or at "normal retirement age". This may be partially achieved through the planned raising of the state pension age, and associated incentives, but it is only likely to be achieved on any scale if work can be made more attractive to older people, and less damaging to their health. Clearly, any strategy to enhance the quality of work would act to enhance the active ageing of the whole workforce and extend working lives. Older peoples' participation in the labour market has been rising, partly as a result of simple growth in the cohort size, but also as a result of rising real retirement ages. This is, in part, a product of an unprecedented period of economic expansion, and does not, in general, reflect any serious improvement in management practices or work design.

**Skills: Getting on in business, getting on at work (DfES 2005)**

This White Paper emerged from the Skills Strategy and stated that:

*'Skills are fundamental to achieving our ambitions, as individuals, for our families and for our communities. They help businesses create wealth, and they help people realise their potential. So they serve the twin goals of social justice and economic success. Improving our national skills performance supports these ambitions in a number of ways:*

- *Replacing the redundant notion of a ‘job for life’ with our new ambition of ‘employability for life’, thus helping people and communities meet the challenge of the global economy . . .*
- *Contributing to the physical and mental health of older and disabled people through their participation in leisure learning, and ensuring that opportunities for learning and training are fully available to all.’*

Support for this strategy emerges throughout this White Paper:

- *‘. . . as the demographic profile changes, with fewer young people entering the labour market, an expectation of a longer working life and an extended period of retirement, we will need to provide better support for older people to keep their skills up to date. Older people will be able to benefit, along with others, from the entitlements and reforms set out above. . .*
- *We will . . . provide better support for older people, both to re-skill throughout their working lives, and to continue in training and learning as a fulfilling part of active retirement.*
- *The main vehicle we are creating for supporting training in the workplace – the National Employer Training Programme – will cater for the needs of diverse employees, including older people.*
- *We are remitting all the SSCs to look at future skills supply, including making more use of older people in the light of demographic trends. Some SSCs are involved in work which helps to recruit and retain older workers. For example, Skillsmart, the SSC for the retail sector, is working with B&Q, Tesco, Asda and Sainsbury’s, who are all targeting older workers to meet their staffing requirements.*
- *There is good evidence that older people can benefit substantially from continuing to learn and gain new skills, as part of a fulfilling and active retirement. Older people who are more highly educated experience benefits to mental and physical health.’*

**The Leitch Review of Skills: Prosperity for all in the global economy – world class skills,** (Leitch 2006) is the most recent document to address the skills and employability situation in the UK. The ambitious skills targets set out in this review suggested that the least represented groups, even those barely mentioned in the review, would need to achieve well if those targets were to be met.

Leitch did not specifically address the 50+ cohort, but there are implications for people aged 50+ in relation to learning and reskilling in three paragraphs. These address employability rather than inclusion:

*‘Many older workers will have to reskill as the UK economy restructures in response to global changes and working lives lengthen.*

*These changes have important implications for the UK economy . . . as the population ages and working lives lengthen, adult workers are more likely to have to update their skills to move into new sectors or adapt to new technologies.’*

Concern is expressed that ‘With more young people qualified to this (*higher*) level and fewer older people, it increases the likelihood of poor deployment of higher-level skills with

relatively under-skilled owners, managers and leaders unable to find the best uses for new graduate recruits.’ The response to this is to be “new types of programme offering specific, job-related skills such as Foundation Degrees.”

#### **6.4 The Scottish perspective**

The Goodison Group in Scotland, an independent organisation with a focus on the economic dimensions of Lifelong Learning, influences policy-making in the Scottish Parliament. The report *Take Hold of Our Future* (2006) summarised three years of research addressing the 50+ cohort. Broadly speaking, this outlines concerns similar to those of the UK government as whole, highlighting demographic change, the need for older people to change their skills-sets and growing concern about the pensions situation. The thinking in *Take Hold of Our Future* can be seen reflected in the *Scottish Lifelong Skills Strategy*, (Donnelley 2007). This stresses the importance of facilitating 50+ learning, and supports it with a case study demonstrating its value. Scotland also has its own Adult Literacy and Numeracy Strategy (Donnelley 2007b), which incorporates approaches to curriculum, assessment and accountability sharply different from *Skills for Life*, the English policy initiative (DfES 2005). A comparative study on the way each policy intersects with policy and practice on older learners in each country would be very interesting.

#### **6.5 National policy implementation and initiatives (England)**

##### **The Learning and Skills Council**

One of the simplest measures of the UK government’s current approach to promoting the employability and inclusion of the 50+ population in England through learning probably lies in analysing the publications of the Learning and Skills Council. A number of these, produced over the last eighteen months have been examined. These acknowledge the sort of imperatives we have already discussed, but do not consistently consider the needs of older learners or provide guidance on how they should be met. For example, *LSC Delivering Learning and Skills – Progress Report 2006 (October 2006)* acknowledges the need for people, in general, to be adaptable, but makes no specific reference to older people:

*‘Operating in a labour market that is rapidly changing requires individuals to adapt and change their skills over the course of their lifetime. A job for life is now rare and the majority of individuals face changes of job and often occupation over their working lives. Furthermore, concern over pensions indicates that people will be in future working longer and are more likely to have multiple careers. The need to adapt to and prepare people for change is at the heart of our employability agenda.’*

The publication *LSC – Learning and Skills: Policy Summaries 2008/09* reviews a wide range of LSC policy and funding priorities. It makes no specific reference to the 50+ cohort in sections where one might have expected them for example in the sections dealing with Skills for Jobs, Union Learning, the Ufi National Contract, and the National Employer Service. The section on the Single Equality Scheme includes two brief references to age in the context of the requirements of the discrimination legislation:

*‘The funding settlement for adult learning from 2008–09 to 2010–11 will:*

- *target public funding at increasing social inclusion and economic success;*

- *increase Skills for Life funding for all ages of learners to over £1 billion by 2010–11;*
- *maintain Skills for Life ESOL funding at projected 2007/08 levels in real terms;*
- *support substantial growth in full Level 2 and full Level 3 achievements;*
- *maintain the safeguarded funding for adult learning at 2007/08 levels; and*
- *provide transitional arrangements to help colleges and providers to manage change effectively.'*

There is no specific reference to, or provision for, the 50+ cohort, although given the legislation, general provision must clearly include it. Employability is referred to in the context of FE provision, Offenders, Jobseekers, and development of qualifications, but not with reference to older people. Under the heading 'Increased social inclusion: the role for skills' the LSC says

*'... we must do more to engage people with low or no skills – those who are more likely to be socially and economically disadvantaged. We must be more innovative in the way in which we excite and connect with those who are least likely to participate in learning.*

*We believe that raising skills levels and gaining new skills and qualifications is essential not only if we are to help more people to come off benefits and to enter and progress in work, but also if we are to reduce social and economic disadvantage and support greater social mobility.'*

Again, there is no indication of how these intentions might affect older people.

The clearest statement of intent appears in the LSC's guidance to providers on older learners for the year 2007-08:

*'Older learners in this context ... are usually regarded as those aged 50 or older. They are an important cohort in both the achievement of LSC targets and in achieving the aims set out in the Skills Strategy and the Leitch report. Consideration should be given to those older learners without a full Level 2 or Level 3 qualification and to those who require basic numeracy and literacy provision to help them to progress to, and achieve, the basic level of employability. This is particularly important in terms of the changing demography and the growing need for older workers to help meet the skills shortages in our economy over the next 20 years.'*

Although this is essentially focused on the well-being of the economy, and not of the individual, the guidance also refers to encouraging learners to stay in learning as long as they wish to derive benefits such as improved health, community cohesion, social inclusion and increased levels of skills and employability. There is no reference in the documents examined to any targets for engaging older people in any kind of learning.

Providers of post-sixteen education recognise, as they always have done, the importance of Adult Learning as a process that generates social inclusion. However, NIACE research shows that LSC funding policy over recent years has discouraged the participation of older learners (see Appendix 1). Research funded by Nuffield is currently being undertaken by the NIACE Centre for Research into the Older Workforce (CROW) to investigate the complex

reasons for this. Yet it has been clear during the course of this project that providers have not been 'incentivised' to work with older people, and the statement of intent in the LSC funding guidance that concerns older people preoccupies them less fully than the requirement to ensure that as many people as possible achieve Level 2 qualifications. Certainly very few providers appear to have even considered how older people might best be prepared to develop up-to-date skills that would enable them to return to paid employment or to become entrepreneurs. Very few appear to have contacts with employers that focus on how to enable older people to enter or stay longer in the labour market; in fact, we encountered no provider with this orientation.

Neither Ofsted nor the Adult Learning Inspectorate (ALI) have made it their practice to evaluate college or ACL provision as it affects 50+ learners in particular, and therefore it is impossible to arrive at any judgements about its effectiveness.

### **Sector Skills Councils**

The Government's priorities regarding employability and upskilling are reflected in statements made by the work of the Skills for Business network, the over-arching body of licensed Sector Skills Councils and their former regulatory body, the Sector Skills Development Agency. The developing need to support larger numbers of older, better-skilled workers is set out in *Future priorities for the network, 2003* (?)

*'Looking ahead, one priority for the Network will be to review future skills supply in each sector, as a basis for more active management of recruitment and development of skills to meet sector needs. There will be far-reaching changes in the composition and profile of the workforce over the next two decades. There will be proportionately many more older people in the workforce as a result of demographic trends. Much of the new growth in entrants to the labour market will be from women and ethnic minority employees. So employers who do not offer equal opportunities in recruitment and development of staff will undermine their own competitiveness.*

*. . . In 1995, the majority of those of working age were under 40. By 2015, that position will be reversed, with around 55% of those of working age over 40. It will not be possible to depend on the inflow of young people to meet skill need. We must regularly upskill and reskill our older workers. Failure to do that will weaken our industrial base, reduce productivity and competitiveness.*

*The Sector Skills Councils have a key role to play in supporting the target of 'employability for life', enabling the offer of focussed and relevant learning to workers both employed and currently without work.'*

There is no evidence from this quarter, as yet, of any central strategy that sets out what the labour market requires of older people, identifies what skills they lack and makes provision to make good the shortfall.

### **Department for Work and Pensions (DWP)**

Under its *Age Positive* banner, DWP seeks broader recognition of the value of older workers, encouraging an age mix in employment that is more favourable to the 50+ cohort. It has focused a significant amount of effort on persuading employers to change their human resources practices so that they are more favourable to older people. The Age Regulations are a key element in creating a level playing field for workers of all ages.

Additionally, the department is responsible for the New Deal 50+ programme. This scheme is targeted at people 50+ who have been unemployed and claiming benefits for at least six months, and as well as guaranteeing personal advice and support to find a job, offers a Training Grant of £1500, which can be used not just for strengthening work skills but also lifelong learning skills. Examples given include first aid and health and safety qualifications, internet and other computer skills, and business skills for the self-employed. The Flexible New Deal Programme will take this process further.

Information about the effectiveness of New Deal 50+ is not available in the public domain. The DWP reports that *'Over 98,000 people have been helped back into work by the New Deal 50+ scheme.'* But we do not know whether they entered sustainable employment, or whether they found themselves back on the unemployment register within a few months. Nor do we know whether they entered employment with training, or low paid, low skilled jobs with no possibility of progression. Further, we have no definition of 'helped'. There is no information on whether the figure includes those who received only guidance as well as those who received guidance and training. Nor is it clear how what people learned, at what level and what they achieved.

Again, there are no Ofsted nor ALI findings that are helpful in determining the effectiveness of New Deal 50+. In fact, it has recently been decided that it will not be inspected separately from other New Deal programmes.

#### **Department for Innovation, Universities and Skills (DIUS)**

In 2007, DIUS commissioned the National Centre for Excellence in the Teaching of Mathematics (NCETM) to work with key partners to develop a *Numeracy for Employability* strategy that would help in the achievement of the targets set out in the Leitch report. The strategy is still in development. Although the 50+ cohort is not mentioned specifically in drafts, the introduction of the Employment Equality (Age) Regulations 2006 mean that older people will fall within its scope.

#### **6.5 Regional initiatives**

*Valuing older people - the Mayor of London's Older People Strategy* (GLA 2006) is one of the more comprehensive statements of commitment to the inclusion of older people in the workforce, and there is evidence of this leading to action. It reflects much of the more positive research and thinking around the 50+ cohort, and recognises much of the relevant statistical information. From the outset, the Mayor commits himself to *'work to tackle barriers to employment for older people.'*

Against that background, the report sets out specific policies for London:

*'More than 11 per cent of Londoners over state pensionable age - 114,000 people - are still in employment. The Mayor believes that older people should have the same opportunities to work as everyone else. But many older Londoners face considerable barriers to employment. This is because of*

- *discrimination*
- *a lack of appropriate skills and access to training, and*
- *working patterns that do not suit their needs.*
- *the need to balance caring responsibilities with employment.*

*The Mayor, through the London Development Agency will back opportunities and initiatives aimed at challenging age discrimination, enabling flexible working and promote measures that help older people. The Mayor will work to promote older people's employment by:*

- *making sure the London Development Agency identifies and responds to older people's employment needs*
- *bringing together all parties working to support employment to those over 50 in London to bring about greater co-ordination in their work*
- *promoting the employment of all Londoners regardless of age*
- *ensuring that the full potential of older entrepreneurs is harnessed for the benefit of London*
- *making sure that skills providers and employers respond to older people's needs for training and development*
- *using his new powers for skills and employment to promote the needs of older people wanting to work.'*

Connected with this overarching policy, the GLA sponsors a number of ESF-funded development projects focussed on older people, and also funds research by Age Concern into the employment support services available to older people across London. There is so far no readily available information about these initiatives' impact in terms of learning, achievements and employment outcomes. Even though this work is publicly funded, it is not clear that it would be inspected by Ofsted.

### **Social Inclusion Partnership for the South East (SIPSE)**

This is a body comprised of third sector organisations and government agencies, e.g. Jobcentre Plus. The report of its Older People Action Group (SIPSE 2005) recommends policy to be developed for the 50+ cohort in the South East, the report focuses on two objectives:

- increasing productivity by getting people back into the labour force
- ensuring that people are able to maintain their income in later life to reduce the numbers of older people living in poverty.

Looking at shortfalls in recent training/qualifications it notes that

*'Although older people often have substantial practical experience and skills to offer, at present, nationally, three million people aged between 50 and state pension age lack qualifications equivalent to 5 GCSEs. (CBI evidence to the House of Lords Select Committee on Economic Affairs, 2003). This lack of formal qualifications can be a barrier for older people seeking work. Problems of literacy and numeracy are prevalent in all labour markets and this can adversely affect older workers, in particular if their skills have not been upgraded since leaving full-time education.*

*People over 50 are severely underrepresented in the current cohort receiving training. One-third of non-pensioner adults are over 50 though only represent one-tenth of adults in work-related training. The main issues for the region are that:*

- *Older people may need to work longer to meet pension shortfall*
- *There is a need for a planned approach to retirement which includes flexible working opportunities*
- *Age discrimination among employers must be addressed*
- *Information, advice and guidance tailored to the needs of older people on learning and work should be made available*
- *Volunteering should be encouraged as a way of contributing to the community and economy.'*

It is not apparent that this agenda has been followed on any regional scale, or that there are similar bodies elsewhere in the country pursuing similar agendas.

### **Findings from Key question 6:**

This discussion leads us to the following conclusions:

1. **Policy regarding the employability of older people has so far had little impact at grass-roots level** - Policy at governmental level has established certain expectations of older people and their need to reskill in order to enter or re-enter the workforce of which they and the vast majority of providers of post-16 education are largely unaware. We found few examples of initiatives that have actually been developed specifically with the employability of older people in mind, little sense that helping older people back into the workforce was a strategic priority and little awareness among providers of the issues that might be involved in achieving this. Our own focus group work revealed that bottom of the list of older learners' priorities are the need to re-enter the labour market and the desire to gain qualifications.

*'Retirement is the best things that ever happened to me!' ( learner, Bensham Grove Gateshead)*

Feedback from the development projects confirms this finding.

2. **Policy statements concerning older people see learning too narrowly as a means just to achieve employability.** Despite the fact that research repeatedly shows that learning in later life enables older people to maintain their health and well-being and to remain engaged with their community, the overwhelming weight of policy focuses on learning as a means to engagement in the labour market. It is easy to assume from this that being 'socially included' means the same as being part of the wage-earning work-force. But this is quite clearly not the case. For example, see the definition provided by the Social Inclusion Partnership South East:

*'[Social inclusion is] individuals participating effectively in economic, social, political and cultural life.'*

The cost benefits to the State of enabling older people to remain fit, confident, active and able to live independently in their own homes, are perhaps not easy to calculate, but nevertheless need to be factored into analysis of why they ought to be engaged in learning.

3. **There are insufficient financial incentives for older people to enter or re-enter the labour market.** It will be difficult to persuade people who have already been employed and are employable, and who are living 'comfortably' post-retirement to give up their present lifestyle. Offers to this group to develop their entrepreneurial skills may prove attractive, but little has been made of this possibility so far. However, it is difficult to see what financial benefits would accrue to people not currently in paid employment and living on a low income, which possibly includes benefits, in returning to what is likely to be a low paid job. The Employment Equality (Age) Regulations 2006 mean that employers are likely to be willing to offer more flexible working arrangements that might be attractive to some older people. But we have seen no evidence of any financial incentives that would make returning to paid employment worthwhile.
  
4. **Policy on employability, at the level of implementation, has too narrow a view about what it means to be 'active in the economy' and 'employed'.** The assumption behind the policy statements we have examined seems to be that paid employment is the only way, or the most important way that older people can contribute to the well-being of society. This is not necessarily the case:
  - Some older people are active in a range of voluntary capacities. Older people are learning champions, members of learners' forums, learning assistants and drivers of community minibuses and ambulances, to give but a few examples. Their work helps build community capacity and maintain social infrastructure.
  - Some are members of the management committees within community organisations, contributing to the decision-making processes at local level.
  - Some younger members of the age group are the unpaid carers of older relatives or partners.
  - Some are unpaid childminders, looking after their grandchildren so that their sons and daughters can be active in the wage economy.
  - Some are active in faith groups, actively working to promote inclusion and harmony in their community.
  - Some use the skills they acquire through Adult Learning to make items that can be used to encourage charitable giving to community and faith groups.
  - Some use the skills they acquire through Adult Learning to make goods that they can sell to friends and neighbours. In this respect, some are already developing their own entrepreneurial skills.

It was beyond the scope and resources of this project to investigate and quantify the scale and the social and economic value of the contributions that older people make in all these ways, but our work with focus groups and with development projects identified individuals who were contributing in four of these ways. There is a tendency to assume that older people are victims of social exclusion, or that they

run the risk of being economically excluded if they are not in paid employment. However, older people are often agents of social inclusion and the nature, scale and 'value' of their contribution needs to be better understood, before efforts are made to apply a 'one size fits' strategy based on a limited concept of 'actively engaged in employment'.

5. **Policy tends to operate on a "one size fits all" basis, and does not thus fully meet the needs of all groups.** For example, policy is not gender-sensitive. Women live longer, and are often faced with new responsibilities when their domestic partners die. It is mainly women who face the possibility of social and economic exclusion as they grow older; it is mainly women who face the challenges of learning later in life. At the same time, women have often had a lifetime of caring for others – running families, caring for children and looking after elders – as well as, in many cases, undertaking paid employment. Women were the majority participants in our focus groups (76 per cent), and are the majority participants in Adult Learning generally. We know little or nothing about how these might predispose (or otherwise) women towards entering or re-entering the labour market. There need to be more nuanced policies and strategies that take account of the concerns and the life experiences of this diverse target group, and sound research is needed to establish what these are.
6. **The role of intermediary bodies is crucial, and there is a need for greater urgency and focus to deliver change.** The signals from the LSC to providers of post-16 education about ensuring that older people are helped to re-skill have been relatively weak. The previous and current inspection regimes operated by ALI and Ofsted have captured little useful information about the nature and quality of the provision in which older people are engaged, and how it benefits them and their communities. In particular, there is no qualitative or quantitative information available in the public domain about the scale or effectiveness of provision designed specifically to help older people increase their employability. Nor have we seen any information from the Sector Skills Councils about what skills it would be useful for older people, in particular, to develop to enter particular sections of the labour market. This analysis may have been carried out, but if so the information is not readily available.

We know that without clear guidance to providers about strategic direction, without adequate funding and without inspection, providers will not see working with older people as a priority, will not set themselves participation and performance targets and will not be focused on continually striving to improve the quality of provision for older people.

## Questions for future research and development

- How many older people who are not active in the formal labour market actually want to work, and how much?
- What kind of employment do older people want, in terms of part-time/full-time, sectors of work, shiftwork, levels of responsibility, etc?
- Which areas of the labour market can be aligned easily with the particular employment aspirations of older people?
- To what extent does practical knowledge (for example in the realm of preventative health) gained in formal learning situations get diffused informally for the benefit of communities through social interaction, and how can this diffusion process be supported?
- For how many existing learners of Maths is this their first occasion of learning since leaving school?
- To what extent are the methodologies for measuring Maths and ICT skills used in the National skills survey and in Skills for Life tests, appropriate and valid for older learners?
- How do women perceive the need for Numeracy and ICT learning at various stages in their lives from age 50 onwards?
- How can older people help their grandchildren with school Maths, and how can this contribute to their own learning?
- What is older people's contribution to social inclusion?
- What is the role of Adult Learning in helping older people contribute to their communities?
- What perceptions do older people have about their own mathematical skills and practices?
- Given the interest shown by other learners in learning mathematics '*to prove that they have the ability to succeed in a subject which they see as a signifier of intelligence, to help their children and for understanding, engagement and enjoyment*' (Swain et al 2005), to what extent are these motivations also relevant for older learners?
- What Numeracy skills do older people need, and for which purposes?
- What benefits would older people with low level skills and on a low income accrue from entering the labour market for the first time, returning to work, and/or deferring retirement?
- What is the nature, scale and social and economic value of older people's voluntary contribution to society?
- How do different groups of older people (eg women in general and minority ethnic women in particular) experience the social and economic issues associated with ageing?
- What factors might make it desirable and feasible for people to enter/re-enter the labour market?

## Appendix 1

### Quantitative data on older learners, Maths and ICT

#### 1. Subjects studied by older learners by age, as a percentage of participants in learning

	Total	Age 17-44	Age 45-54	Age 55-64	Age 65-74	Age 75+
Computer skills	24%	19.3%	22.7%	37.4%	51.3%	34.2%
Basic Maths/Numeracy	0.8%	0.8%	0.7%	1.1%	0.6%	No figures

#### 2. Learners motivated to gain recognised qualifications, by age, as a percentage of participants in learning

	Total	Age 17-44	Age 45-54	Age 55-64	Age 65-74	Age 75+
Motivated by qualifications	27%	34.98%	20.7%	9.1%	4.6%	2.5%

From *What older people learn: the whys and wherefores of older people learning*, by Fiona Aldridge and Alan Tuckett, (NIACE 2007)

#### 3. Age and Numeracy level

	Whole population (n=8040)	All 45-54 (n=1551)	Men 45-54 (n= 728)	Women 45-54 (n= 823)	All 55-65 (n= 1538)	Men 55-65 (n=702)	Women 55-65 (n= 836)
Entry level 1 or below	5%	6%	5%	6%	8%	6%	9%
Entry level 2	16%	16%	14%	18%	19%	14%	25%
Entry level 3	25%	24%	21%	28%	26%	23%	29%
Level 1	28%	27%	26%	29%	27%	27%	27%
Level 2 or above	25%	26%	34%	19%	20%	30%	10%

#### 4. ICT awareness and Age

	All (n= 4464)	45-54 (n= 853)	55-65 (n= 884)
Entry level or below	25%	29%	44%
Level 1	25%	26%	24%
Level 2 or above	50%	45%	32%

#### 5. ICT performance and Age

	All (n= 4464)	45-54 (n= 853)	55-65 (n= 884)
Entry level or below	53%	61%	75%
Level 1 or above (inc. tentative L2+)	47%	39%	25%
(Level 2 or above)	(9%)	(8%)	(4%)
Level 2 or above awareness and Level 1 or above performance	39%	34%	20%

From *The Skills for Life survey: A national needs and impact survey of literacy, numeracy and ICT skills*, (The Stationery Office 2003)

## Appendix 2

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## Appendix 3

### Useful websites

**Older and Bolder**, the website for the NIACE initiative:

[http://www.niace.org.uk/Research/older\\_bolder/Default.htm](http://www.niace.org.uk/Research/older_bolder/Default.htm)

**CROW**, the Centre for Research into the Older Workforce, a research site based at NIACE:

<http://www.niace.org.uk/crow/index.htm>

**Older People and Lifelong Learning: Choices and Experiences**, part of the ERSC site synthesising its research findings:

<http://www.esrcsocietytoday.ac.uk/ESRCInfoCentre/PO/releases/2002/december/older/earning.aspx?ComponentId=1961&SourcePageId=1403>

**The Pensions Commission** website:

<http://www.webarchive.org.uk/pan/16806/20070717/www.pensionscommission.org.uk/www.pensionscommission.org.uk/publications/2005/annrep/annrep-index.html>

**The Social Inclusion Partnership South East Older People's Action Group:**

<http://www.raise-networks.org.uk/sipse/op.html>

**Opportunity Age**, the DWP strategy for older people:

[http://www.dwp.gov.uk/opportunity\\_age/](http://www.dwp.gov.uk/opportunity_age/)

**Numeracy for Employability**: NCETM website:

<http://www.ncetm.org.uk/Default.aspx?page=12&module=news&mode=100&newsid=6226>

**Valuing Older People, the Mayor of London's Strategy:**

[http://www.london.gov.uk/mayor/strategies/older\\_people/index.jsp](http://www.london.gov.uk/mayor/strategies/older_people/index.jsp)

**Employers' Forum on Age (EFA):** <http://www.efa.org.uk/default.asp>

**Age Concern England:** <http://www.ageconcern.org.uk/AgeConcern/default.asp>

**The Scottish Government website on Older People:**

<http://www.scotland.gov.uk/Topics/People/OlderPeople>

## **Appendix 4**

### **Project Team and Acknowledgements**

#### **Project Team members**

Janet Swinney, Project manager (to 31-12-07) and researcher

Nigel Robinson, Researcher

Sue McClure, Researcher

Jay Derrick, Project manager (from 01-01-08) and researcher

Joan O'Hagan, NIACE Project Co-ordinator

Angela Fox, Administrator

Other project research work carried out by

Sarah Bosley, NIACE researcher

Critical reading and editorial advice by:

Carol Taylor

Stephen McNair

Alan Clarke

Tony Maltby

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Phil Bird, Northern College

Rae Twidale, Westcliff Neighbourhood Centre, Scunthorpe

Kevin Pearson, Head of Adult Learning, Gateshead Council

The Headworks Group of learners, Gateshead Library

Learners at Bensham Grove Community Centre, Gateshead

Heather Carter, Family and Community Learning Services, City of Sunderland

Residents and staff at Tom Urwin House, Silksworth, Sunderland

Kathy Dredge, North Halifax Skills Centre, Calderdale

Ruth Stead, Calderdale College

Joanne Patrickson, Calderdale College

## Appendix 5

### A selection of quotations for boxes scattered throughout the text

It is very easy to think of older people as belonging to one identifiable group of, for example, 'over-50s', 'third-agers', 'pensioners', or 'senior citizens'. Yet 'older people' can be aged anything between 50 and 100 and all they may really have in common is that they have managed to stay alive!

Every individual ages differently. Growing older can be seen as a complex interaction of biological, psychological, historical and social processes, and it seems that, as we age, we actually become *more different* rather than more alike. Apart from the influence of age itself, and of gender, class, race, ethnicity, marital and socio-economic status, living arrangements and perhaps religious belief, older people are highly diverse in terms of their physical functioning, psychological performance and overall health status.

*From **Older People Learning myths and Realities** by Alex Withnall, Veronica Mc Givney and Jim Soulsby (NIACE 2004)*

The comparison of subjects studied by different cohorts highlights the importance of the inclusive aspirations for a learning society captured in the 1998 government policy paper ***The Learning Age*** and enshrined in the remit of the Learning and Skills Council. The comparisons show that whilst studies related to work and studies that bear qualifications are of central importance for younger learners, and whilst they remain important now for many older learners, older learners also study the arts, religion, history and music in significant numbers. At a time when social policy focuses ever more single-mindedly on 'economically useful skills', large numbers of people use learning to make sense of, and enrich their lives.

The study highlights, too, how the motivation to learn changes through the life cycle. For older learners a passion for the subject, pleasure in the act of learning, a concern to strengthen self-confidence and to meet people are all powerful incentives to learning, and the section of questions asking for the benefits learners had gained confirmed the success of their studies in meeting their aspirations, for increased confidence, new contacts and improved communication skills. The importance of personal development as a motivation for learning increases with age. Taken with the evidence from the Centre for Research on the Wider Benefits of Learning of the social benefits of learning, our data indicate the beneficial effect of providing older adults with a choice of opportunities to learn.

*From **Aldridge and Tuckett 2007***

*The Nationwide Building Society increased its recruitment age limit and saved more than £5 million in costs because of reduced staff turnover.*

*B&Q's Macclesfield store, staffed entirely by people over the age of 50, achieved 18 per cent more profit, 39 per cent less absenteeism and significantly lower staff turnover than benchmarked stores when research was conducted in 1991.*

*From **NAO 2004***

*'I remember my mother telling me a story about her grandmother not being able to read and how, as a child, she had tried to help her. I thought how touching it was that a child should try to do that. And then I realised that the same thing is true for IT and our*

*generation, and that's how young people view us. I decided I would learn IT to avoid the same situation with my own grand-children' – learner, Focus group*

*'It's therapeutic when people have experienced a life trauma, like being widowed. It's a way of rejoining a social network.' – learner, Focus group*

*'You use the maths you learned in earlier life, and you apply it to do what you want; in the same way that you learned how to cook.' – learner, Focus group*

*'What a lonely life it would be if we didn't have all these learning opportunities. Now that communities are no longer the same [i.e. not as close-knit] they offer a chance to meet with like-minded people.' - learner, Focus group*

*'I wouldn't want to sit behind a computer all day long: it's isolating' – learner, Focus group*

*'It's always been one of my weaknesses.....I've never been good at maths, but since starting here I'm starting to understand things a bit more.' - learner, Focus group*

*'I needed instruction on how to use my laptop' - learner, Focus group*

*'Keeps the brain active too, that's part of it, that's one of the reasons I wanted to come. I don't know if it's active or activate!' - learner, Focus group*

*'There are a lot of senior people who want to get to know about the computer and e-mail and things so they can keep in touch with their granddaughter...they don't want to get left behind' - learner, Focus group*

*'Another good point is the place is local and there's plenty of parking , easy to get to' - learner, Focus group*

*'It's a relaxed atmosphere'- learner, Focus group*

*'Not to made to feel an idiot'- learner, Focus group*

*'One of the main things is we're actually learning'- learner, Focus group*

*'I've never done a spreadsheet until this morning and I managed to finish one'- learner, Focus group*

*'The learners actually dictated the programme' (Tutor comment)*

*'It doesn't feel like maths'- learner, Focus group*

*'If you're still trying to recruit I'd keep the word 'maths' out of it'- learner, Focus group*

*'Basically they were brought up with imperial and they find themselves looking at metric, that's where the problem lies'- learner, Focus group*

*'It's something as basic as when you're shopping, being able to work out, to add up, how much the items are costing'- learner, Focus group*

*'The other thing is about diet – the foods that have all these fat content, salt, all the rest of it'- learner, Focus group*

*'Can I just add, that one thing that I often notice is the language of maths can be a problem with people of fifty plus, of which I am one, because some of the modern terminology is not what we grew up with'- learner, Focus group*

*'They want to keep up with their grandchildren'- learner, Focus group*

*'They want to let their children know that they can still do it'- learner, Focus group*

*'Once you start switching off it goes very quickly'- learner, Focus group*

*'Digital cameras are technology aren't they?' - learner, Focus group*  
*'That's a problem for our age group – 'it's oh, it's too complicated' – so a course like this actually widens your horizons rather than narrowing them' - learner, Focus group*

*'Whilst age is an important factor in the information society, older adults' use or non-use does not constitute an urgent cause for either celebration or concern. The digital 'grey gap' should not distract us from the serious offline social issues facing the growing population of over-60s. Viewing older adults' use of ICTs from a more socially diverse and nuanced perspective should form the starting point for future work in this area, as adult educators begin to get to grips with the ever-aging population.'* – **from The myth of the silver surfer, Gorard and Selwyn (2008a)**

*'Really liked the quick accessibility of finding out what things mean using the software eg. what APR means. It's quick and easy to see and helps you understand what they are talking about' – learner, development project*

*'The question 'how does your lifestyle affect your heart rate?' was posed. Obviously this can be a risky business with pensioners; they elect to do 20 star jumps out on the lawns strictly at their own risk. The natural desire to see evidence of whether yoga for the over seventies has done any good takes over in this case and there isn't a single abstainer. Arming learners with nothing but a mini whiteboard to record results emphasises learners developing their understanding by working things out for themselves. They choose the instrument to measure time with, they decide on an appropriate period of time to count heart beats for and on how much time to leave in between measuring heart rate after exercise. Using a spreadsheet at this point is just too good an opportunity to miss. In a group like this you are bound to have some learners with experience of spreadsheets and others with none: this provides an ideal opportunity to use peer teaching, knowing that entering some data items onto a spreadsheet and producing a graph is achievable at this level. The advantages of printing out graphs which show individual heart rate patterns were clearly evident: the learners were all fully engaged, questioning their own lifestyles and marvelling at the fact that the benefits of those early morning swims could so readily be seen on a graph! The fundamental benefit of the task is that because learners were so interested in seeing the outcome, they fully immersed themselves into discussion on how to sort out any mathematical task they encountered along the way – functional skills at its best.'* – tutor, Development Project

*At the start of training I was really nervous and unable to take in what it was all about with so little confidence. But by your method of only having 2 or 3 people each lesson seemed so much better and I was able to grasp much more. After originally starting a class at the learning centre in groups of 10 people I felt helpless and unable to understand little that was being taught. - Learner, Development Project*

*I have found a lot of value in doing the course. The in depth information and explanations have increased my understanding of pc's in general and have built up my confidence levels in all areas. - Learner, Development Project*

*Tried a different insurance company online and used direct instead of using a broker. Did this after learning about it. - Learner, Development Project*

*Although it wasn't really relevant to me, I enjoyed all aspects of each Module - Learner, Development Project*

*Rather too much information to take in, especially for the elderly who can be a bit slow on the uptake. - Learner, Development Project*

*This was a great source of help finding out so much I did not know about Banking, safety and the Internet - Learner, Development Project*

*Jane (pseudonym) is a very quiet and somewhat nervous person especially in larger groups. She expressed her unhappiness with another course she was attending at a Learning Centre where the size of the group, the speed with which material was covered and the trainer's style made her feel extremely insecure, inadequate and generally unhappy. She is also suffering from Parkinsons which is another obstacle she has to overcome and is not helped in a pressured environment. Hence she has really enjoyed this course, its subject matter, pace of delivery and individual attention.- Tutor, Development Project*

*Difficult to assess whether this course will prove to be of lasting benefit to Mary (pseudonym). Although she showed keen interest when present she has health issues and a serious eye problem which may eventually lead to blindness. - Tutor, Development Project*

*John (pseudonym) tends to leave financial matters to his wife who is already very comfortable using computers for banking, shopping etc. As such, despite his genuine interest in the issues we covered on this course, he admits he will find little personal advantage to himself apart from the fact that he now understands the issues and techniques involved a little better. - Tutor, Development Project*

*Ann is a very thoughtful person and found all of the subjects covered very interesting despite her concerns over security. This will probably prevent her from carrying out financial transactions online but she will still make use of sources of information and price comparison aids etc. - Tutor, Development Project*

*'I have enjoyed both classes immensely. They have been fantastic! Both were excellent. The topics covered in both classes were exactly what I wanted...the most welcoming classes I have ever attended. It is a shame that the classes are coming to an end. I wish that some way could be found for the classes to be continued as I have enjoyed them so much.'* – Learner, Development Project

*Bill (pseudonym) was a very active member on the course from the beginning and went to as many sessions as he could. Although he was not looking for employment, he enjoyed attending the Job Search and Personal Effectiveness sessions and at the end of that course offered to assist younger learners at the centre who might appreciate help looking for work. Jim enjoyed team work in that session and worked with another older learner to clarify a questionnaire for younger learners.- from a learner case study, Development Project*

*Dennis (pseudonym) is a learner over the age of sixty who has mental health problems and has been extremely dependant on his family. During initial assessment the learner felt that he may not have the ability to participate fully in the practical application of the course. This was mainly due to low confidence and poor self esteem. However, as the course progressed, the learner expressed pride in his achievements; he has far exceeded*

*his own expectations by participating fully in each session. He did need support with his numeracy during the preparation period, but has gone on successfully to prepare a budget, which he later transferred to a spreadsheet. This learner was extremely nervous about using a computer and had not even switched one on before yet his confidence improved so dramatically that, when he was asked if he wanted to use the auto sum function (for ease) or actually calculate the formulae, he rose to challenge and not only calculated the formulae to add up his income and expenditure, but then proceeded to work out the formulae, on his own, for his disposable income. Distance travelled for this learner is immense. – from a learner case study, Development Project*