Improving seniors’ quality of life: a toolkit to evaluate education for elderly learners

http://www.edusenior.eu

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Ageing is one of the greatest social and economic challenges to European societies in the 21st century. It will affect all Member States and it will cut across nearly all EU policy domains. By 2025 more than 20% of Europeans will be 65 or over, with a particularly rapid increase in the number of citizens over 80 years old.

Institutions that teach seniors (65+ years old or retired) need to address courses to a target group that is not aiming to get a degree or to improve their career opportunities. They must therefore apply different methodologies and also create specially designed courses, activities and materials. From a broader perspective, their main aim is to increase senior learners’ well-being and quality of life (QoL). In this context, teaching becomes a socio-educational activity where more formal, non-formal and informal activities are blended. The knowledge students acquire is important, but other skills, attitudes and aims should not be forgotten such as socialisation, integration, adapting to society, active citizenship, etc.

Existing research defines QoL in terms of both objective and subjective perceptions. Some parameters are available for evaluating QoL and, therefore, to take action to improve an individual’s QoL. Levels of QoL may fall as a result of several kinds of risks (e.g. loneliness, isolation) and may rise due to other activities that promote integration or communication. Education can be used to minimise the risks and maximise QoL. The promotion and enhancement of QoL in senior citizens is highly positive as it not only leads to happier seniors, but also to more active, productive, participative, healthy older people who require fewer social services and whose value in society is increased.

This evaluation toolkit is addressed to teachers, trainers, tutors, facilitators, staff, technicians, managers and decision makers who want to know more about the QoL-education relationship among senior citizens. It is directly aimed at those people who want to set up an education programme for senior citizens.
Why Quality of Life matters

When basic needs are covered, everybody has the right to pursue other targets in life: happiness, self-realisation, independence, etc. All the above concepts are related to QoL, but they must be understood from the individual’s subjective perception; having a good QoL means that one’s life is pleasant and valuable.

QoL is based on external and internal components. The external components are those established by the community everybody lives in (social services, health, transport, security, etc.). The internal components are those that derive from ourselves: optimism, perceived control, adaptation, etc. People with a higher QoL have better attitudes to face the challenges and problems of life. Their perception of a health issue or problem is more positive. They participate more in social activities, their neighbourhood and family.

QoL is an aim that represents the long-term direction of society’s progress, in which every individual tries to live a rich life, in the broadest sense. In general, society benefits more from citizens with high QoL than from those with low QoL. Moreover, low QoL tends to imply greater expenditure on social services and medical services.

Senior Citizens

Although there is a large body of research and numerous publications focusing on disabled, marginalised or dependent people, few studies have explored the issue of senior citizens or retired people who capably manage their lives, and whose health problems are only those that typically accompany the ageing process. These people fall between the ages of 65 and 80 or even older as health conditions are improving.

The ageing process can be critical in any individual because it involves major changes. These changes and the loss of control are the main factors that jeopardise individuals’ QoL, particularly when they are unpredictable and people are unprepared for them. There are changes in work (retirement), family, society, our bodies, and
health related problems that require adjustments to the perceptions and structures of our lives. All of these are psychological, physical and social challenges that can lead to a decline in QoL if the individual does not deal with them in the right way.

On the other hand, this stage of life offers the chance to grasp new opportunities because people generally have more time to participate in social activities. Senior citizens also have a wealth of life experience that should not be lost or wasted. Society can benefit from seniors with good QoL, not only because of their increased social participation, but also through lower social and health service expenditure.

**The role of Educational Institutions**

There are public institutions, non-governmental organisations and associations as well as laws and regulations that combat poverty, exclusion, discrimination and other social aspects that create suffering and unfair living conditions. Actions to increase individuals’ QoL can be taken from a global (governments, law, regulation, services, institutions) to a local (communities, families, friends, individual) perspective.

From the global-local perspective, individual QoL can be impacted through education. Learning has many stages in life; while children need to learn the most basic knowledge and social skills, training for adolescents and adults focuses more on professional skills and competitiveness. Education for elderly or retired people does not aim to improve their promotion chances at work, and their motivation is purely personal. The most common reasons they give for wanting to learn are: to find out about a subject they are curious about; to know more about today’s society and its history; to understand modern society and keep abreast with changes; to avoid exclusion; and to remain active and creative. On the other hand, institutions offer this kind of educational activity because they know that they are beneficial for senior citizens: it equips them with the skills to face the challenges of present society, and to be more active and participative. Those concepts are closely linked to the aim of increasing seniors’ QoL.

Group A from the 1st course at the UJI, Castellón, Spain. 12.05.2012. Today’s lesson is “Learn to change, start enjoying”.
The design of any educational intervention aimed to increase learners’ QoL is not something that can be gained in the short term through a course subject or other activity. This very broad aim requires a carefully design of the entire teaching-learning process which involves not only the course content, but how it is taught, how learners interact, the environment, and many other aspects that will be covered in this guide.

Education can impact seniors’ QoL, but like any other habit, skill or attitude, QoL can be learnt in the same way as we learn tolerance, friendship or the right way to face up to challenges.

**The Guide**

The book entitled “Education and quality of life among senior citizens“ is the first of the three products to come out of this project.

The book has seven main chapters, in addition to the introductory chapter and the final one (challenges, conclusions). The book begins with a theoretical perspective and moves on to a more practical approach. The first three chapters establish the background needed to understand QoL, and also the needs and potentialities of the elderly. These chapters set out to provide information about why this topic is important and what we should focus on:

1. Quality of Life
2. Ageing
3. Social context

Following this background on the requirements of the elderly and the aims and targets of the educational action, the next four chapters offer information about how the educational activity should be provided and the skills and competences of the staff that provides it, in other words, who.

4. Models
5. Pedagogy
6. Content
7. Staff, trainers

Each chapter introduces the main topic, and also includes local context and experiences, within the following structure:
Introduction and development of the chapter topic, providing mainly theoretical information.

European context, illustrating the chapter topic from the perspective of each partner country.

Experiences and best practices. These include examples of good practices, research, projects or experiences related to the chapter topic.

The first part of each chapter aims to give the reader a clear idea of the topic. Readers who wish to further their knowledge can explore the references listed at the end of each chapter. The second and third sections of the chapter offer the reader practical examples that can be used and implemented in other institutions. More information about the experience in each institution can be obtained by contacting it directly.

The guide has been published in English and in all the partners’ languages. References to the English version should be made as follows:


Online (PDF) and printed versions are available. Author’s names should be used in referencing any of the individual chapters.
Guide Content

Introduction

Pilar Escuder-Mollon, Roger Esteller-Curto

A basic introduction to the guide, its motivation, aims and target and how it should be used is provided, together with a brief description of the institutions that participated in the project and the authors.

1. Quality of Life

Pilar Escuder-Mollon

This first chapter introduces the concept of quality of life (QoL) and three of its most relevant theories. It also focuses on the dimensions and facets that can be applied to seniors’ education, thus providing an initial approach on how to impact seniors’ QoL through education. Experiences and good practices include:

- Researching QoL and Education. This experience summarises the results of two studies. The first aimed to uncover the impact of education on QoL from the learners’ perspective. The second offered experts’ experience in increasing the quality of an educational intervention to raise learners’ QoL

- Active Seniors Learn, Educate, Communicate and Transmit project. This is a European cooperation project, which promotes seniors both as (re)sources and beneficiaries of learning. This is an example of how seniors’ active participation impacted their QoL

- Perception of QoL by Latvian seniors. This research explored Latvian seniors’ perception of their physical health, which was found to be related to vitality, joy for life and fatigue.

2. Ageing

Ulla Eloniemi-Sulkava

Ageing is a complex but extremely heterogeneous process. There are changes in the body, in the structure and role of the family and relationships, but also in self-perception of the ageing process. The aim of this chapter is to provide basic information and good understanding to then design educational actions that facilitate successful ageing, with good subjective life satisfaction, social participation, good cognitive
performance and psychological resources. Experiences and good practices include:

- Heterogeneity of ageing. Tailored activities should be offered by educational institutions; a list of activities is proposed focused on increasing the well-being of the elderly.

- Psychological image of seniors in Poland. In comparison to other European countries, Polish seniors are less active, which is accompanied by a sense of isolation and marginalisation, and a general aversion to social activity. This can be seen both as a cultural issue and as a false negative stereotype that needs to be changed.

- Breaking down myths and stereotypes about the elderly. Four common stereotypes are presented and broken down in relation to education.

3. Social

Massimo Bardus, Giuseppina Raso

Senior citizens are becoming an increasingly important part of society, not only because of the proportion they represent in our society, but also because of their participation. When talking about the social context of the elderly, it is necessary to consider the potentialities of active ageing: how to take advantage of intergenerational links, volunteerism, and digital inclusion, etc. All these are very important positive factors to be promoted through education and which society can also take advantage of. Experiences and good practices include:

- Project “Moving your minds”. The project aimed to offer guidelines on how to maintain and support the integrity of cognitive functions in senior citizens. Activities were proposed to achieve that aim, but the project also recommended involving other social actors (elderly associations, clubs, etc) and activities (intergenerational, games, etc), which would help to increase the impact in the immediate area, enriching the activities and raising learners’ motivations with more suitable, local activities.

- Learning in Rural Areas. This experience showed how education is delivered to senior learners in rural areas in Castellón (Spain), with specific differences from their counterparts in the city in terms of their needs, requirements and benefits.

- Female and Male Life Expectancy Difference in Latvia. In Latvia, the life expectancy of the population over 65 is lower than the average for other EU countries. There are also psychological barriers which are different in men and women, and that cause social differences: activities, social participation, participating in training courses, etc.
4. Models

Alina Gil, Luis Ochoa Siguencia, Urszula Nowacka

The educational model specifies how all the educational activities, teachers and tools are organised in the framework of an institution. Awareness of this relationship makes it possible to use the models that are most suitable to impact specific areas of seniors’ quality of life. Experiences and good practices include:

- Keeping fit in later life. This project aimed to help senior learners to maintain and improve their physical fitness. Informal learning was applied in different spaces: trainers and learners, between learners and learners individually (using ICT).
- Formal course structure. Although it is not usual to apply a more formal structure to seniors’ education, it has great benefits for their QoL, as identified in this experience.
- Informal Learning through Leisure. Extra-academic activities not specifically designed for educational purposes enable learners to acquire other attitudes and competences that are not easily learned in more formal courses.

5. Pedagogy

Velta Lubkina, Svetlana Usca, Aivars Kaupuzs

Senior learners’ rich life experience is the first characteristic to be aware of when implementing a pedagogy; that pedagogy can also be designed to increase and develop specific QoL areas (cognitive, psychomotor, affective). Experiences and good practices include:

- Educational needs in Latgale (Latvia). The results of this research confirm the conclusions of socio-ecological theory, indicating a dual connection between an individual’s behaviour and the environment. Seniors prefer to learn based on their previous experience and in a self-directed way.
- Intergenerational Learning Circle for Community Service. The experience in the EScouts project is described, in which pedagogy based on intergenerational learning in blended environments and spaces is applied.
- New knowledge to get new information. Social cognitive theory is applied to facilitate involvement of participants in daily physical activities, helping to preserve physical and mental health.
6. Content

Slavina Lozanova, Boian Savtchev

Content provided must be based on senior learners’ needs, requirements and motivation, with a view to acquiring new skills or updating existing ones, encouraging their active ageing and participation, and ensuring their own well-being and improved quality of life. Selection and design of content has become a key issue, alongside the way in which it is delivered, and which competences it tries to develop to face the challenges of modern society. Experiences and good practices include:

- A case study on intergenerational learning. The project “Elderly people now online: school in the afternoon project” in Bulgaria is an example of how children and seniors learnt together, achieving different targets at the same time. On one hand school children were appointed as ‘trainers’ to share their knowledge and skills, and on the other, senior ‘trainees’ learned how to use technology and acquired ICT skills. Both parties benefitted from this process by developing competences and skills to communicate with each other in an intergenerational learning environment.

- Course Structure in the University of Third Age (UTA) in Poland. The typical structure of the UTA in Poland is described, and specifically that of Czestochowa, where subjects are aimed to increase seniors’ physical and mental health.

- ICT for seniors. The increased use of new technology and innovations in the modern information society determines the need for ICT skills and competences. The experience presented refers to courses provided in Finland, tailoring different pedagogical approaches and measures within a certain educational course, sharing knowledge and experience, and mutually benefiting from the multicultural environment.

A group of senior learners in the UJI on 09.05.2011 in a ICT classroom, today’s subject is the WikiSenior http://www.wikisenior.es
7. Staff, trainers

Enikő Nagy

The role, competences and skills of the staff and trainers are the most crucial issue in educational institutions, as these workers have direct and continuous day to day contact with senior learners. This is very important because of the high human component in senior education. Their expertise can make a success out of failure in an educational action for seniors. Here the institution also has tools (evaluation, training, etc) to ensure the quality of its personnel. Experiences and good practices include:

- Adult educators, project SAGE. This project produced a framework of competences that can be applied to qualify adult trainers as participation facilitators for active citizenship amongst people aged over 50.
- Training the trainers. The experience in the SenTrain project is presented as an example of how a training programme was provided to train trainers for seniors.
- Teachers in the non-formal system in Italy. These experiences reveal the need to validate trainers’ personal competences in non-formal education. Trainers not only must be experts on the topic they teach, but also good communicators, motivators and with the social skills to face any challenge in the classroom.

8. Challenges and the future

Pilar Escuder-Mollon

Based on the experience of the partnership and that gained during the evaluation of the guide, this chapter summarises the most relevant challenges in seniors’ education, bearing in mind that education is a right for every individual, and is beneficial not only for the senior citizen, but also for today’s society and for the coming generations.

A group of senior learners in the UJI on 18.01.2013 are explaining their experiences to the rest of their classmates after a meeting in Slovakia and Czech Republic in the framework of the Grundtvig Learning Partnership http://www.seniorsks.eu
This evaluation toolkit is designed to evaluate an educational institution that teaches senior learners. In this context, the evaluation is carried out from the perspective of the impact that the educational intervention has on the learners’ Quality of Life.

The aim of this toolkit is to evaluate your institution. That is clearly a very ambitious objective which is not easily accomplished, and we recognise the limitations. There are many different kinds of educational institutions with highly contrasting objectives; each institution’s target group can also be very different (elderly in good health, elderly immigrants, or elderly at risk, etc.); and the institution’s social context and its limitations can also make a big difference. These factors mean that an exhaustive, strict and objective evaluation is impossible. However, we have taken these limitations into account in designing this toolkit as a powerful tool not centred on evaluation to obtain an award where a high score is the most important objective, but rather to be applied in an institution together with the guide and as a highly practical tool to find out about how to increase the quality of your institution.

You can apply this toolkit:

- to find out your institution’s weaknesses and obtain information about how to increase the impact of the educational action on your senior learners’ QoL
- to obtain internal or external accreditation
- to find out which educational characteristics (courses, activities, etc) are most suitable to impact facets of QoL.
The evaluation toolkit has been published in English and in all partners’ language. You should cite the English version as follows:


**Educational vs. QoL Dimension**

From existing quality of life theories and models, and research done in the project, seven quality of life dimensions and characteristics were selected from the total. The criterion for this selection was that they could be affected by seven different kinds of educational actions. These dimensions are summarised below. Assessment indicators were extracted from the intersections between these dimensions.

**Quality of life dimensions:**

1. Physical health. Increasing; the health of the individual, reducing pain or illness (requiring less medication or visits to the doctor) or increasing independence. Knowledge about the general ageing process, illness or good habits; lowering risks, delaying the impact of ageing or improving self-perception.

2. Psychological health. Increasing positive attitudes towards the ageing process, cognitive and mental functioning, protective factors for psychological disorders like depression

3. Integration. Feeling integrated in society, with more communicative and social skills; improved knowledge of the environment

4. Participation. Increasing participation in the educational institution; in communities, families, friends; in society in general

5. Control. Related to increasing perceived control (internal and external, primary and secondary). Improving learners’ skills and competences to discuss, negotiate, and communicate, but also to accept and adapt. Acquiring skills to analyse and know more about ourselves and how we are related to the environment (links with other people)

6. Personal growth. Increasing optimism, motivation, energy to do things

7. Personal fulfilment Spending time usefully and pleasurably, feeling comfortable, spending time on oneself, fruitful leisure time for oneself.
Educational dimensions:

1. Institution: premises (physical buildings) and operational logic (how services are offered and organised)

2. Management and organisation, including: the general aims of the institution (objectives and strategic aims), internal processes of the institution, management decisions and internal regulations. How the work inside the institution is performed, whether regulated or carried out on the basis of routines and tradition

3. Educational models: ways the learning contents and activities are delivered. This includes the formal, non-formal and informal models, but educational models are more about: how education is provided by the institution (not how a specific course is offered); the design framework that conditions how it will later be implemented (pedagogies, courses, content, evaluation)

4. Pedagogy: application of techniques and educational methods to courses and activities.

5. Courses: any kind of learning processes where a teacher is involved and has a related teaching plan even if that plan has not been formally established (content, competences to be achieved, pedagogy, timing, objectives, evaluation)

6. Activities: any kind of learning process where a teacher is not involved continuously and has no teaching plan (a web-site, trips, extra-academic activities, etc).

7. Staff and trainers: includes the operational level of the personnel – coordinators, teachers, tutors, facilitators, administrative staff, etc. including competencies and skills, functions and responsibilities

Assessment indicators were extracted from the intersections between these dimensions. The evaluation is based on 38 indicators, each of them belonging to at least one of the QoL dimensions and one of the Educational dimensions.
The evaluation is based on 38 indicators, each of them belonging to at least one of the QoL dimensions and one of the Educational dimensions. Justification, the requirements to be met and recommendations are provided for each indicator. The indicator titles are as follows:

1. Accessibility  
2. Meeting points  
3. Spaces for participation  
4. Institutional self-evaluation  
5. Social activity promotion  
6. Senior’s requirements evaluation  
7. Participation of learners in management  
8. Learning provider  
9. Learners’ accreditation  
10. Acquiring social attitudes informally  
11. Formal learning provider  
12. Formal learning groups  
13. Comprehensive educational activity  
14. Intergenerational learning  
15. Constructive pedagogy  
16. Learn by research  
17. Participatory pedagogy  
18. Learn to learn  
19. Competences for life changes  
20. Digital adoption  
21. Physical  
22. Languages  
23. Problem-based learning  
24. Psychological well-being  
25. Cultural trips  
26. Informal learning outside the classroom  
27. Increase in cognitive skills  
28. Social meetings  
29. Artistic performances  
30. Volunteering as a social contribution  
31. Digital inclusion  
32. Expertise exchange  
33. Artistic creativity  
34. Gerontology training  
35. Intercultural awareness, diversity and multiculturalism  
36. Trainers communication skills  
37. Professional burnout and stress management  
38. Motivation and optimism

**Guide and Evaluation Toolkit Application**

The guide and the evaluation toolkit are complementary; the guide provides the background, theoretical concepts and practical experiences, adding local context, while the evaluation toolkit extracts the key facets based on educational and QoL perspectives.

The toolkit references the guide to extend some of the indicator recommendations. In addition, any person reading the guide can use the toolkit as a resource to link the broad theoretical concepts (strategic target) with clearly detailed actions (operational activities).

The evaluation toolkit can be used for more than a simple assessment:
You can use it to find weaknesses and potentialities in educational institutions; to find recommendations to increase the Institution’s quality, to have a better picture of its strengths and to exchange good practices, etc.

The toolkit can be used for accreditation by external evaluators and for advice and recommendations about how to improve the quality of your institution.

The toolkit can be used to provide a general overview about educational dimensions and also to learn which educational characteristics can most impact seniors’ quality of life. It is therefore very useful to design and set up an educational activity.
Research and innovation

The last, but not the least, product to come out of the project is the innovation reached through analysis and research, published in papers and presented at conferences, depending on the project phase:

First, an extensive study about QoL and education in the elderly was carried out during the initial phases of the project. This forms the basis on which the rest of the products were developed. Those reports can be downloaded from the project website.

Second, as outcomes were being reached during the project, the products could be analysed, to test their effectiveness and impact. Finally, the guide, evaluation toolkit and the evaluation done during the test phase are also provided as an input for academia and other research to continue innovating in the adult education area.

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<table>
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<th>Project</th>
<th>EduSen is a Grundtvig multilateral project under the Lifelong Learning Programme of the European Union. It runs from 01.11.2011 to 31.10.2013 and is made up of seven partners from Spain, Italy, Poland, Bulgaria, Latvia and Hungary. <a href="http://www.edusenior.eu">http://www.edusenior.eu</a>  <a href="mailto:edusenior@uji.es">edusenior@uji.es</a></th>
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| Needs | • An ageing society; in 2020 more than 20% of Europeans will be 65 or over  
• A lack of research and practical guidance linking education, quality of life and senior citizens  
• Institutions working with seniors that wish to (re)design their educational programmes to impact seniors’ lives positively |
| Aims and objectives | • To offer a scientific framework for the relationship between education and quality of life amongst the elderly  
• To increase the skills of staff, technicians and teachers working in education for senior citizens  
• To have a positive impact on seniors’ lives through education |
| Outcomes and products | 1. A practical guide for institution staff aimed to increase their knowledge and competences  
2. A practical evaluation toolkit designed to assess an educational process, identify areas for improvement, and provide recommendations and accreditation  
3. A set of dissemination activities to increase the knowledge and information about education on seniors and quality of life, through research and valorisation activities in academia, decision-makers and other institution and networks |
| Estimated impact | • More skilled institution staff, wider reach of institutional aims to impact on senior learners  
• Better quality of life for seniors; increased well-being, perceived control and integration  
• Society with more active and participative senior citizens. Lower social services expenditure |