

Final Report

Project

"Business Development and Qualification (BusQua) – for the Development and Implementation of an Experienced-Based Qualification of Older Employees under Consideration of Operating Interests"

Lifelong Learning Programme – Leonardo da Vinci – Innovation Transfer

**Additional Qualification as Senior Attendant
Occupation-Supporting Advanced Training**

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The project was sponsored with funds of the European Union under the Leonardo da Vinci Lifelong Learning Programme.

Eichenbaum GmbH, Gotha 2010

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1. Introduction

"Older employees understand the interests of more mature customers and impart upon them the feeling that they are understood. This ability affects the consulting situation and can have positive effects on the purchasing decision.

*"Older salespersons possess a solid specialised knowledge, are responsive to customers, are quite courteous."*¹

The present concept for an occupation-supporting qualification as senior attendant was developed within the framework of the Leonardo da Vinci Innovation Transfer Project BusQua (additional information at www.uni-erfurt.de/busqua), and is being sponsored by the European Union under the Lifelong Learning Programme. With this concept, an additional option was created of maintaining the ability to work of older employees, and, by means of an occupation alternative, offering a possible occupation that they may pursue until they begin drawing on their pensions.

Based on the demographic change, changing requirements are arising for these employees and the maintaining of their ability to remain employed. This alternative was developed particularly with a view to the Allgäu region. The well-developed tourism industry in this region and the changed composition of the age structure of travelers represent important resources and an opportunity to maintain the ability of older persons to remain employed. Older employees are themselves suitable for qualifying as senior attendants, given the fact that they have a high degree of experience, social expertise and knowledge. Those persons who have already for some years been employed in the tourism and food industries (or in support and care professions) may, with this qualification, rely on existing knowledge and capabilities. In addition to such characteristics that are highly applicable, with the occupation alternative, a gainful job can be developed that facilitates favourable work organisation and design for seniors, and nevertheless represents a gainful and economically profitable occupation. With the structural analysis of the Allgäu, which was likewise generated within this Leonardo Project, specific conditions of this region with corresponding arguments for senior support may be gleaned by analogy to travel companions for persons with reduced mobility. In the following, the concept of senior travel support is initially described, in order to afterwards deal more specifically with qualification contents and possible learning material. In the conception, the job of senior support is presented with the needs, the job description and the personal capabilities of the implementing person. In the qualification processes following this, the individual contents and modules (such as, for example, communication and consultation, issuance of offers and aspects of pricing and complaints) with corresponding activities are described more specifically. In the last part, a more specific description of the component work processes of senior support follows. For example, details of arrival and departure trips, accommodation and excursions are considered and adapted to the corresponding characteristics.

¹ BAGSO, Consulting expertise in the domestic appliance trade for the target group of 50plus, p. 10

The self-learning material developed for this purpose is oriented to the successful and excellent methodology of the "Kund.i.K." project, and places learners in the position of working independently and in a manner to supplement the contents and modules. Thereby, a documentation of the qualification arises, which may be applicable for the certification of the measure. In the end, a comprehensive and integrated qualification option thereby arises, which is particularly interesting and suitable for older coworkers.

In principle, a great challenge is presented in finding alternative operating fields of activity for older employees who are suitable both for the requirements of the operations and those of the employees.

From view of the company, "new" activity is to be commercially sensible, whereby some employers would be prepared to minimise performance requirements.² Older employees who are placed in the reorientation also expect

- the avoidance of impairments caused by age (in particular, physical stresses)
- the integration of age-specific strengths
- the avoidance of disqualifying issues
- a contribution to corporate success
- securing and/or facilitating employment

The important prerequisite - to "match" such requirements - consists of bringing into conformity the individual service of each older person with the operational and/or regional requirements.

² Huber, A./ Kräußlich, B./ Staudinger, Th.: Earning opportunities for older persons? AIP Augsburg Integration Plus GmbH, Augsburg 2007, p. 73

2. Regional structural development

2.1 Current economic situation in the Bavarian Allgäu

The economic situation in Bavaria is quite well compared to the global economic crisis. In the period of June 2008 – June to 2009, job losses amounted to around 53,000 persons, yet this reduction is smaller than in the 2002/2003 crisis.³ However, current economic surveys of chambers of commerce demonstrate a clear recovery in capacity utilisation, a noticeable increase in incoming orders and an improvement in future prospects on the broad front. In the industrial field, positive growth was experienced by the industries of mechanical engineering, automotive engineering, food, metal processing and treatment and chemicals/plastic. In the context of the project, it is worth mentioning that in 2009 there were 1,921,650 overnight stays in the Allgäu.

2.2 The regional job market in the Allgäu in the 3rd quarter of 2010

In October 2010, the number of unemployed persons decreased to 8,535. That corresponds to a proportion of 3.5%. Thereby, for the first time in 2010, the number of employed persons fell below 9,000. Compared to the previous month, a decrease of 543 unemployed persons (or 6.0%) is to be observed.

The comparison to October of the previous year is particularly positive. Within the period of one year, the number of persons reporting unemployment decreased by 1,658 (or 16.3%). 35.5% of the unemployed persons are in the age group of 50 to under 65.

In October 2010, 889 job notices were newly received at the Kempten Employment Agency. This represents an increase of 5.2% compared to September 2010.

Those being sought are specialists in the hotel and food industry for the winter season and trained employees in health occupations. Moreover, personnel services are increasingly seeking specialists, predominantly for deployment within the commercial area.

From January to the middle of October of this year, 200 businesses notified the Kempten Employment Agency of short-time jobs for approximately 3,200 employees.⁴

2.3 Aspects of demographic development

Under regional and project-related aspects, the effects of demographic change are meaningful.

In the businesses, the proportion of persons in the higher age groups has been increasing for some time, and will increase by an even stronger level in the next few years. Thus, measures for jobs geared towards older persons are becoming more and more important, yet at the

³ IAB operating panel "Employment trends in the Free State of Bavaria 2009 – Part 1", Stadtbergen March 2010

⁴ Kempten Employment Agency, Labour Market Report for the reporting month of October 2010

moment the continuing education proportion of older persons is smaller than for younger employees.⁵

The population trend in the Allgäu will be positive until 2019; i.e., a slight increase is to be recorded. By 2029, a slight decrease will then have to be recorded. However, the situation will clearly change in terms of structure. The youth dependency ratio (number of 0 to 19-year-olds per 100 persons in the ages of 24 to 64 years) will decrease from 35.7 in 2009 to 31.5 in 2029; in contrast, the old-age dependency ratio (number of 65-year-olds and older persons per 100 persons in the ages of 24 to 64 years) will increase from 36.6 in 2009 to 50.2 in 2029.⁶

From the perspective of the market and the development of opportunities and potentials, the Allgäu is particularly appealing for older persons as one of the most delightful cultural and natural landscapes, be it as a holiday destination or as a residence for retirement age.

"Based on their many years of consumer experience, the target groups of "Generation 55+" have developed clear consumer demands. The consequences are clearly articulated requirements and expectations regarding the quality of products and services. "Mature customers" would like to forget their age-related restrictions and instead live out their expertise – not only as retail customers, but also as users of products that are user-friendly; i.e., their convenience demands are sufficient. Of decisive importance for clients is the conduct of sales personnel and their consulting expertise. "Matures services" represent an additional success factor. They are expected as a central characteristic of the overall services of older consumers, and offer retail companies an opportunity to differentiate themselves from price-aggressive competitors."⁷

3. The tourism industry in the Bavarian Allgäu

The current development concepts, which are being submitted and discussed by different participants⁸, point to an increasing importance of tourism. "Tourism is a cornerstone in the economic structure of the Allgäu and must also remain this in the future. Thereby, a development strategy for tourism must start from both the protection of existing offer structures,

⁵ IAB operating panel, "Employment trends in the Free State of Bavaria 2008", Stadtbergen June 2009

⁶ Bavarian State Office for Statistics and Data Processing: Demographic Indicators: Region of the Allgäu; Munich 2010

⁷ PricewaterhouseCoopers AG, Generation 55+ – Opportunities for Retail and the Consumer Goods Industry; Frankfurt am Main 2006

⁸ See: Regional Planning Association of the Allgäu: Regional Plan of the Region of the Allgäu, Goals and Principles, November 2007; Memmingen u. A. Committee of Commerce and Industry: "Allgäu" Development Concept – draft of 4 July 2006; Unterallgäu Regional Development Concept, Unterallgäu Aktiv GmbH, 2007; Oberallgäu Regional Development concept 2007-2013, Local Action Groups for Regional Development in Oberallgäu, 2007

and an active design of the structural change."⁹ In the same way, this approach is being incorporated in the regional plan for the region of the Allgäu and is being consolidated into one goal going beyond this: "Working towards a development the cluster within the area of "tourism / health industry".¹⁰

These strategic approaches and goals are incorporated into regional contexts and combined into action proposals, which connect the fields of tourism and health on the basis of the developments specified above. The activities thereby derived from this should sustainably strengthen the regional economic structure, expand the value-added chain and increase the quality of products and services.

Due to the demographic change in the coming years, the activity profile of some occupations in the industries of "health / support", "wellness" and "tourism" will experience great changes. On the one hand, activities are "growing" together (hybrid activities); on the other hand, new activities are arising, such as "travel companion for persons with reduced mobility", "health service specialist" and "specialist for movement and fitness exercises".¹¹

Clients who are becoming older, the needs of whom these activities are also being tailored, expect a different kind of consultation, if they are to accept such products and services.¹² In addition to the various additional aspects, this changed consultation is to convey the understanding for the special 50+ group of clients and their expectations.

The industry investigations of the DSFT German Seminar for Tourism from 2009 assume that, in the course of the represented developments, the attraction of the new generation will become more difficult in the Allgäu region, and the importance of older employees will slightly increase. Moreover, a stronger need for age-appropriate infrastructures and offers that are relevant to tourism is predicted.¹³

4. The curriculum and the qualification process

4.1 Preliminary remark

⁹ See: Memmingen u. A. Committee of Commerce and Industry: "Allgäu" Development Concept – draft of 4 July 2006, page 2

¹⁰ See: Regional Planning Association of the Allgäu: Regional Plan of the Region of the Allgäu, Goals and Principles, November 2007, pages 16 - 17

¹¹ See: Abicht, Lothar/Freikamp, Henriette: Determination of trend qualifications as a basis for the early recognition of qualification requirements, isw Institut für Strukturpolitik und Wirtschaftsförderung gGmbH, Halle April 2007, pages 12 - 14

¹² See: Federal Labour Association for Senior Organisations (BAGSO): Consulting expertise in the domestic appliance trade for the target group of 50plus, Bonn February 2008

¹³ DSFT: Effects of the demographic change on tourism and conclusions for tourism policy; Berlin 2009

Due to the demographic change, the age structure of tourists is also changing. The most strongly represented group in the Allgäu consists of seniors and/or older employees who will pass into retirement age in the upcoming years. With the development of alternative employment options for older persons, the "BusQua" Project is reacting exactly to this changed age structure in the target group of the services offered and the employees. Relevant aspects for the target group of today's retirees are a pronounced consciousness of quality and the desire for activity and health care along with a wellness programme. Despite their advanced age, they would like to travel, enjoy culture and remain active. The tourism industry must completely adjust itself to these demands, and train correspondingly qualified personnel. In this manner, client orientation is realised in a particularly high degree, and the strong economic factor of the tourism industry is stabilised and continues to develop. Special demands of older travelers are intentionally recognised and, through the engagement of older employees, the demographic change (with its developments) is counteracted.

Points of contact to already existing qualifications:

- personnel from all tourism-related occupations (e.g., food, health and hotel occupations)
- tour operators, travel guides along with travel agency workers
- traders in tourism and leisure time
- tourism assistants
- assistants for leisure time and/or health tourism / prophylaxis
- wellness consultants
- mobility support and consultation
- specialists for support
- travel assistants for persons with handicaps
- specialists for health services (nurses, private service providers and nursing assistants)

Requirements of personnel:

- pronounced social expertise
- patience, empathy and openness
- flexibility and client orientation
- ability to communicate, friendliness
- sociability, reliability and ability to cooperate

Additional contents of qualification:

- issuance of offers
- time management and self-management
- care and handling of seniors

- first aid and basic medical knowledge
- logistical aspects
- law and liability
- basic knowledge of accounting and pricing
- basic knowledge of psychology
- EDP and Internet
- procurement of information for guests (knowledge of the region)
- consulting expertise and communication training
- successful telephoning
- complaint and conflict management
- correspondence

4.2 Participating actors

The project entitled "Business Development and Qualification (BusQua) – for the Development and Implementation of an Experienced-Based Qualification of Older Employees under Consideration of Operating Interests" was developed in a work-sharing process together with the partners

- University of Erfurt, Faculty of Education Science, Teaching Field of Continuing Education / Adult Education, Erfurt, Germany
- Kenniscentrum Beroepsonderwijs Arbeidsmarkt, Nijmegen, Niederlande
- Zorska Izba Gospodarcza (Zory Chamber of Commerce), Zory, Poland
- Eichenbaum GmbH, Gotha, Germany

and implemented with additional regional partners. Within the framework of the structural analysis for the Bavarian Allgäu, the occupational field of "senior attendant" in the tourism industry was identified as a future-oriented field of activity for older employees. In cooperation with regional partners in the Allgäu,

the Garmisch-Partenkirchen Adult Education Centre

the European project office of Herzogsägmühle in Peiting

the "Auxiliary Qualification as Senior Attendant" was developed as an occupation-supporting advanced training course for older employees. The output product of this auxiliary qualification was the innovative concept of the model project entitled "Occupation-Supporting Qualification for Older Employees as Examined Client Consultants in Small and Medium-Sized Enterprises (Kund.i.K)".

Eichenbaum GmbH furnished the development and adaptation service, developed the materials and carried out the inter-regional transfer and distribution. The regional partners carried out the implementation work.

4.3 The Curriculum

For quite some time, the instruction and learning research have pointed to the necessity of introducing changed forms of instruction and learning. The findings that were gained concern learning processes in general, but, beyond this, have particular importance for older learners. For the areas of both school and occupational learning, it is shown that learning is always an experience-based and active process, for which successes in learning are more extensive the more the learners are integrated into the learning process with their previous knowledge.

It is also known that learning processes are more effective when the connotation of the learning to the area of application of the subject matter being taught (e.g., to the particular occupational action field) is more clear. This may be achieved by a connection of work and learning; a principle that is implemented in, among other things, the method of work process orientation.

Findings of instruction and learning research

The following initially identifies some central arguments for a form of continuing education in the area of instruction and learning research that is oriented to work processes:

- the subjective importance of learning contents promotes the use of deep strategies upon learning; i.e., the learners exert greater efforts in comprehending the importance of the information and connect it with their previous knowledge. Instructive learning, which frequently aims at the reproductive of individual contents, tension and agitation have hindering effects on the application of such strategies.¹⁴ When learning in the mostly trusted working environment, such effects are allowed to be reduced.
- individuals learn through their own actions (mental discourse with contents and specific acting). In the process of the development from layman to expert in the particular area, practice in handling articles and persons plays a crucial role (e.g., development of precision, elegance and speed).¹⁵
 - Important factors for success in learning are knowledge of one's own conditions for achievement and independent control of the learning progress. Continuing education that is oriented to work processes promotes securing success in learning through forms of learning support and through the necessity of proving the subject matter being taught in actions on the job.¹⁶
 - In reference to the condition of knowledge structures, the following is assumed: a prerequisite for successful continuing learning and problem solving is "a solid and well-organised knowledge base in the particular domain". This does not mean isolated and individually acquired knowledge, but intelligently ordered knowledge that is networked into itself, tested in various situations and flexibly adjusted.¹⁷

¹⁴ See Rohs, M./Mattauch, W. (2001): Conceptual bases of the work process-oriented continuing education, Fraunhofer Institute of Software and System Engineering, ISST Report 59/01, pp. 37-38.

¹⁵ See *ibid.* p. 39

¹⁶ See *ibid.* p. 40

¹⁷ Federal-State Commission for Education Planning and Research Sponsorship 1997, p. 17

- Investigations for the psychological management of learning in terms of motivation resulted in the finding that intrinsic learning motivation (learning on a voluntary basis and based on interest) is promoted primarily,
 - if there are selection options and margins for independent actions (perceived support of autonomy),
 - if feedback takes place from the matter and is oriented to individual learning progress (perceived support of expertise),
 - if collegial handling is maintained, and there is a relaxed, friendly learning atmosphere (perceived social integration).¹⁸
- From the view of constructive concepts, it is assumed that learning is not a passive act of the incorporation of information, but rather an active and open constructive process of knowledge regarding the world. The situatedness of the acquisition of knowledge is of special importance here. In this connection, one assumes
 - that the separation of knowledge content and the context of application leads to the fact that knowledge is poorly used in real situations ("sluggish knowledge"). In order to ensure a high degree of knowledge transfer, learning situations should be designed as authentically as possible and/or in a manner that corresponds to real application or work situations.
 - that learning represents a strong interpretation of facts that depends on the previous knowledge of the learners. Consequently, the learning methods that are preferred are those that are aimed at the promotion of autonomy. Instead of imparting information, learning environments are to stimulate one's own construction of knowledge.¹⁹

4.3.1 Regional transfer of innovation

With the structural analysis for the Bavarian Allgäu (work package 2), a set of indicators was compiled, which thereupon provides evidence for the fact that suitable fields of activity for older employees can lie in the areas of tourism, wellness and health services (see also Item 2 of the Final Report), and thus offer a solid prerequisite for the regional transfer of innovation:

- the industries of "tourism", "wellness" and "health services" represent regionally important potentials for growth and employment
- various regional development concepts and strategy documents are promoting qualitative growth in these areas

¹⁸ Prenzel, M. (1996): Conditions for self-determined motivated and interested learning in studies. In: Lompscher, J./Mandl, H. (editors): Instruction and learning problems in studies. Han Huber Publishing: Göttingen, p. 21

¹⁹ See Gerstenmaier, J/Mandl, H. (1995): Knowledge acquisition under a constructivist perspective. In: Magazine for Education Science 41, p. 873 f.

- the dovetailing of the industries of tourism, wellness and health services are creating new perspectives for employment and requirements for employees, also regarding the aspects of Europe's demographic change
- qualitative growth requires new knowledge and capabilities of the actors

In addition, changes are taking place in the industries themselves, which are entailing qualification requirements. These may be summarised for the industries of tourism, wellness and health services as follows:

- consulting expertise, the capability of client-oriented manner and actions along with culturally integrating behavioural patterns.²⁰
- to a great degree, such "soft skills" are covered by the strengths that are particularly attributed to older employees:
 - know-how
 - reliability
 - able to deploy oneself flexibly in terms of time

Based on the aspects once again summarised here, it appears sensible to initiate occupation-supporting qualification activities within the areas of

- tourism
- wellness
- health services

with the goal of extending the occupation perspectives of older employees and developing and presenting an auxiliary use / value increase for all participants (both employers and employees).

The methodical instructional approaches and the experiences arising from the "Kund.i.K" basic project were examined for their transferability, and then transformed into changed contexts that are new to the region and brought about by the requirements.

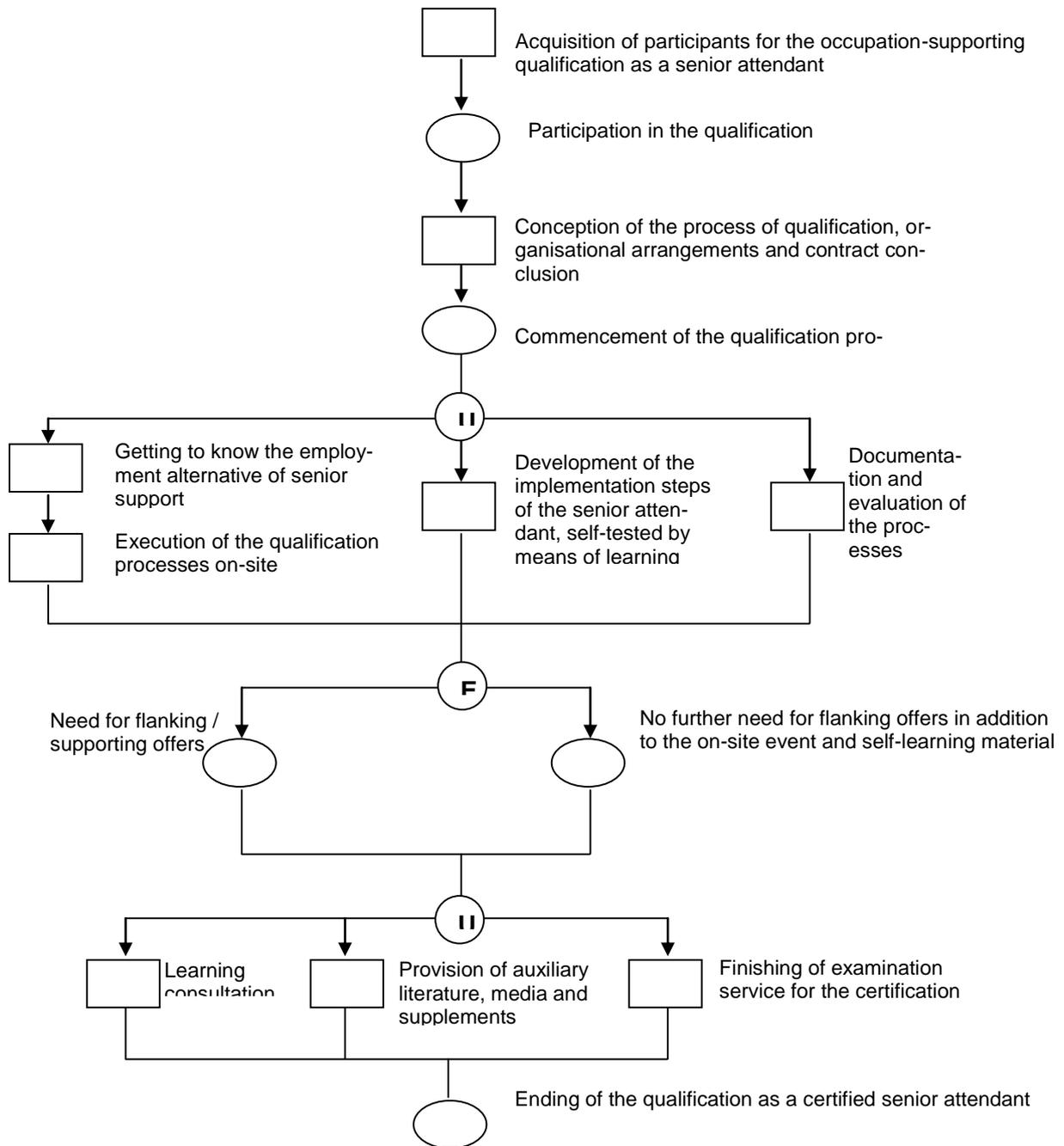
4.3.2 Structure and contents of the auxiliary qualification of "Senior Attendant"

4.3.2.1 Overview of the overall process of the auxiliary qualification

The entire qualification process comprises a scope of 160 hours and is applied as an auxiliary qualification for employees. Thereby, the on-site phase of the qualification processes is to be fulfilled in 56 hours. In the remaining 104 hours, the participants are to learn independently with the assistance of the self-learning material. For this purpose, additional learning consultants and auxiliary literature are to be available to them. The goal at the end is a comprehensive documentation of the overall learning process, which then represents the basis

²⁰ Abicht, L./ Freikamp, H.: Determination of trend qualifications as a basis for the early recognition of qualification requirements, isw gGmbH, Halle April 2007, pages 11 - 15

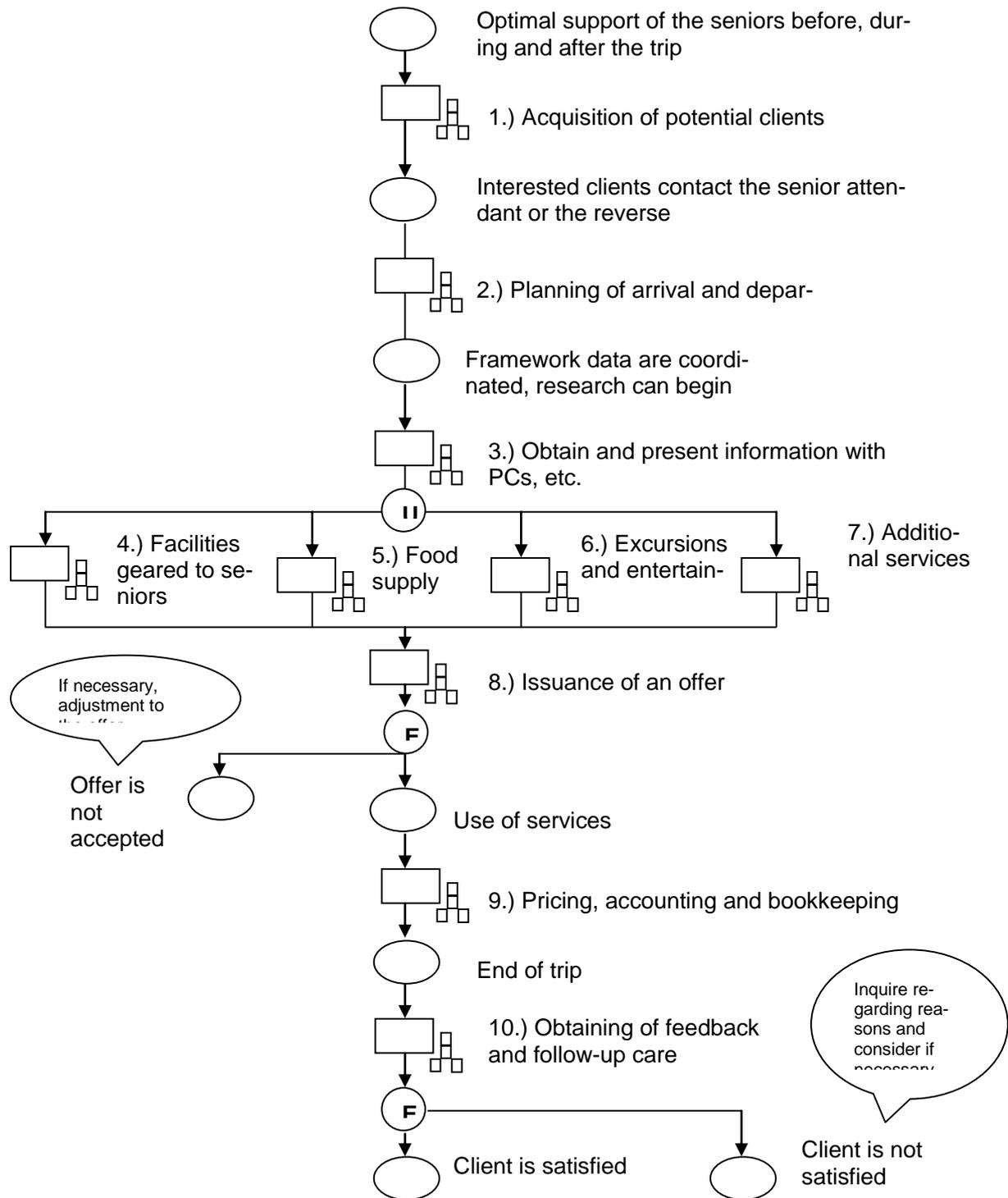
for the certification of the qualification. In the following, we present the overall qualification process as an overall process:



4.3.2.2 Qualification processes

From the preceding general description of the senior attendant (see Item 4.1 - Preliminary remark), relevant needs and specific modules for the qualification can now be derived. These are in turn the basis for a professional exercise of the occupation alternative and the satisfaction of the clients. The qualification processes are handled and worked through to an extent of 56 hours on-site together with an adult educator. All 5 specified processes are to be regarded as options and are to be adapted, designed and implemented according to the capabilities and field of application of the employees. In terms of content, they are composed for the demands for senior support, and were developed under a holistic focus without creating any claim to absolute completeness. In the following, these individual qualification processes will be described more specifically, and the contents, methods and examples will be classified.

- I. Qualification process: Time management and self-management**
- II. Qualification process: Consultation and communication**
- III. Qualification process: Medical aspects**
- IV. Qualification process: Client orientation**
- V. Qualification process: Complaints, conflicts, law and liability**



4.3.3 Structure and content of the materials

4.3.3.1 *Important modifications*

The adaptation of the process initially presupposes considering the framework conditions of the occupational areas from which the participants in the advanced training course originated. In the adaptation, it proved vital to also undertake modifications in the implementation of the concept.

This essentially concerns two areas:

A) Changes in the degree of specification of the learning materials for the occupational areas: in the model project, participants from various occupations from the hotel and food industries were given further training. Since the learning materials should be applicable in the same way for all areas, their degree of generalisation inevitably had to increase.

B) For the "assigning" companies, it could not be assumed that the specialist superiors of the participants would be constantly prepared to see through the practical continuing education work of their employees in the operations through a continuous technical consultation regarding the learning contents. Moreover, for all participants, there was an absence of the necessary prerequisites for the necessary conditions to acquire for oneself in complete self-initiative the bases for client consultation from the set of literature or other learning media.

In view of this background of the adaptation, a "mix of methods" was selected, in which the approach of work process orientation and self-directed learning was implemented as far as possible; however, for better participant orientation, forms of knowledge transfer also took place through on-site learning at the education centre.

4.3.3.2 *Reference material for the adaptation of the approach*

For the present adaptation, the following bases were employed:

- "Conceptual bases of work process-oriented continuing education" (Fraunhofer Institute of Software and System Engineering, ISST Report 59/01, Rohs, M./ Mattauch, W.)
- "Reference Profile of IT Business Consultants" (Fraunhofer Institute of Software and System Engineering, Dr. Mattauch, W.)
- "Ordinance on occupational advanced training within the area of information and telecommunications technology, of 3 May 2002, amended by the Ordinance of 29 June 2002 and 23 Feb. 2005", Section 4: Certified IT Business Consultant.
- Kund.i.K client consultants in KMU – working material for practice-based learning of typical work processes of client consulting in small and medium-sized enterprises (Eichenbaum GmbH 2007)

From the materials, both the theoretical instruction and learning assumptions, the structure of the methodical materials and the continuing education and examination procedure may be extracted. From this, forms of the adaptation were derived. As a reference for the present model project, the profile of the client consultant was selected. The share of communication of this occupation profile are comparatively high compared to the other profiles. According to

this, this activity profile and the pertinent reference project exhibits a nearer proximity to the task profile of the senior attendant.

4.3.3.3 Brief description of the fields of activity and deployment

The support of seniors or groups of seniors involves a complex and comprehensive activity. It contains the areas of the tourism, wellness and health industry, and combines the possibilities of the particular industry with the characteristics of the target group. All of the consulting, organising, structuring and specifically implementing tasks must be mastered. This means, for example, that excursions are organised and planned, information on various aspects is made available, offers are obtained and submitted or assistance in everyday tasks is even provided. A very high degree of service and client orientation are important characteristics of senior support. Auxiliary services (such as pharmacy services, medical care and sometimes also nursing aspects) could be made available as additional offers. The health status and degree of mobility of the seniors are decisive for the scope and type of support. Through an extensive service offer, which may be drawn on individually, travel is to be made possible for older persons up to a very high age. Doubts are weakened, solutions are offered and the seniors experience the feeling of being "in good hands". At the end, senior attendants must be able to optimally connect their own experiences and knowledge of the particular region with the needs and desires of the seniors to be cared for, and from this develop an excellent service

This includes the following activities:

- guidance and support of older persons
- support in overcoming mobility barriers
- planning, structuring and organising trips and excursions / ventures
- client-oriented consultation
- conflict management
- provision of information and further imparting
job order planning along with pricing, planning and implementation of additional / individual services
- motivating and encouraging older persons
- individual design of solutions
- providing information on regional objects of interest, excursion destinations and attractions

4.3.4 Qualification processes

4.3.4.1 Time management and self-management

Activity: Work as a senior attendant with application of time management and self-management

As a senior attendant, appropriate time management and self-management are required for occupational success. Thus, stress, excessive demands and even problems such as "burn out" are to be directly successfully avoided from the outset (prevention). Handling older persons often requires from the attendant a very high degree of patience and perseverance. Tasks that arise and are difficult to calculate due to their high demands for flexibility may be better mastered with the appropriate time management. Trained self-management helps the senior attendant with appropriate scheduling and a sustainable management of reserves, resources and energy. Through a systematic procedure and incorporation of meta-perspectives, errors will be visible, and will be able to be both balanced and better avoided. A smooth operational sequence can thus be ensured, whereby clients experience a service that is speedy and client-oriented. Such contents are imparted by means of literature and in workshops, and are transferred into the specific occupational connection.

Field of expertise: Time management and self-management

Content:

- The concept of self-regulation
 - The concept of time management
 - The concept of motivation
 - Methods of self-regulation, time management and self-motivation
 - Goals and priorities
- II Resource calculation
- III Reflection
- Process of planning, conducting and monitoring and the cognitive processes thereby transpiring

Total duration: 16 h.

Example:

As an attendant, you are assigned by a senior with ordering a taxi for the next morning at 8:00 a.m. In addition, it is 2:00 p.m. on Monday, and you must still reserve seats in a restaurant for a different travel group for the same evening, and check your incoming e-mail messages. At first, you briefly reflect on what tasks are to be handled, and fall back on experience, as long as the tasks usually occupy your time, and you newly plan the further course of the day built on this. For example, initially reserving the seats at the restaurant and, even before handling the incoming e-mail, reserving the taxi. This means ordering a taxi for the first time on the next morning should be avoided, since without the presence of the taxi there would otherwise be barely time to replan. This would unnecessarily cost more resources, motivation and energy.

4.3.4.2 Consultation and communication

Activity: Communication with and consultation of older clients

Older persons particularly appreciate personal, comprehensive and expert consultation. Upon communication with older persons, one does not observe any characteristics that are not also generally embodied in client orientation. For example, one must pay attention to providing clear and understandable advice in order to avoid misunderstandings and errors. Likewise, in professional consultation, stereotypes, tips and manipulations must generally not be sought out. Particularly with older clients, one should refrain from using anglicisms and buzz words. Senior support regards all clients with the same respect and the same seriousness. With the overall process, a high degree of client satisfaction is the highest goal. Expert consultation facilitates the issuance of an appropriate offer, which in turn represents the basic prerequisite for client satisfaction. The imparting of content is effecting in workshops and through literature, which is illustrated and supplemented with interactive instruction methods (e.g., role playing).

Field of expertise: Target group-oriented communication and consulting

Content:

- current concepts in communication
- consulting and questioning techniques
- frequent and typical problems and errors in the consultation process
- methods of information transfer
- sources of information for offers, costs and relevant aspects

Total duration: 16 h.

Example:

An older gentleman would like to be advised by you as a senior attendant. He does not think himself capable of deciding he should take a day trip to the thermal spas or take a walk in the mountains. As a consultant, it is now your task to, through targeted questioning, finding out the relevant consulting aspects, and on this basis pointing out appropriate alternatives and providing supplemental information. Thereby, the gentleman is put into the position of making his decision on an appropriate basis, without sole responsibility being taken away from him.

4.3.4.3 Medical aspects

Activity: Knowledge of and attention to medical aspects for the target group of seniors

For older persons, when physical complaints arise, they are usually aggravated. Typical complaints of older persons (such as diabetes, rheumatism and reduced capability of sensory organs) must also be considered during any trip. It must be made explicitly clear that this usually involves an activity at the level of first aid or support. In this area, personnel should act only within their own expertise. Older employees from the area of care are possibly more comprehensively trained. During this qualification process, basic knowledge is repeated and refreshed, but explicitly medical personnel are not qualified.

Steps and practical exercises of first aid training are repeated and practised. The goal of this module is attaining an overview-like knowledge of content and attaining expertise in action, with the assistance of which seniors are supported by senior attendants and may be provided medical care in the event of emergency. The contents of this qualification process are imparted mainly with technical literature and exercises.

Field of expertise: Medical and nursing provision of seniors

Content:

- basic knowledge of first aid
- knowledge and organisation of resources and products
- providing consultation and assistance
- particulars of nutrition

Total duration: 8 h.

Example:

An older woman is unwell in the late afternoon. She has not eaten anything since lunch. It is your task as an attendant to inquire about possible illnesses and, for example, be aware of the connection between the level of blood sugar and meal times, and on this basis to initiate the correct actions - for example, administering a small amount of glucose or informing a physician. Through basic knowledge of various medical areas and with the help of questioning techniques, and initial level of care may be ensured, until specially trained personnel are available on-site to provide further help. In this manner, older persons feel well cared for, and any panic that may arise can be avoided. Moreover, measures of first aid are fundamental knowledge, which you must have a command of and be able to apply.

4.3.4.4 Client orientation

Activity: Realisation of a maximum level of client orientation

As a senior attendant, one should be able to optimally adjust oneself to the specific target group of older persons, with their needs. For aspects, mobility and nutrition, it is therefore essential to make inquiries regarding the preferences and ideas of the target group and consider them in the offer. For this purpose, specifics should already be known to a certain degree prior to the start of the trip. As a senior attendant, your tasks include, among other things, pre-selecting and/or reasonably redesigning the corresponding services, or completely reconceiving them. Client orientation also includes the ability to reasonably present and describe information to seniors. Space for changes and inquiries must be created, and appropriate alternatives must be submitted. In addition, capacities should always be available for unscheduled, individual services. The contents of client orientation are initially imparted theoretically, and afterwards actively practised and implemented in the form of role playing exercises and small projects.

Field of expertise: Formulation of offers and client orientation

Content:

- aspects of client and service orientation

- systematic consultation and inquiring
- presentation and providing information to seniors

Total duration: 8 h.

Example:

Client-oriented handling is characterised by the ability to take the place of clients and thereby act according to their interests, options and demands. For example, it is not very client-oriented to offer to an older gentleman in a wheelchair a guided hike through the mountains. However, if one presents to a prospective client offers that correspond to his interests, preferences and options, one saves time and resources, and the client feels optimally cared for and in good hands. He has a pleasant and positive experience with the services, which could perspectively allow him to become a regular client. Client loyalty and positive publicity are probably the most sustainable positive effects of good client orientation.

4.3.4.5 *Complaints, conflicts, law and liability*

Activity: Complaint management and conflict management

As in all service industries and for all target groups, it is also the case with senior support that complaints and grievances will occasionally arise. Here, it is particularly important to react appropriately, appear secure and never lose sight of client orientation. These capabilities and subjects of expertise must be acquired and solidified, which is to occur in the "Complaints, conflicts, law and liability" qualification process. In addition, this knowledge may also be used with possible conflicts between travelers. In addition to the reaction, naturally, aspects of contractual law are also to be known. Moreover, such contents are analysed both theoretically and in practical implementations, and are run through with different roles.

Field of expertise: Complaints and conflict management

Content:

- professional actions in conflict situations (maintaining of businesslike manner, orientation to solutions, etc.)
- solid communication abilities (application of the fundamental communication rules, solution-oriented attitude)
- knowledge of contractual components and corresponding contents
- knowledge of corporate laws along with liability claims, servicing of warranties, etc.

Total duration: 16 h.

Example:

An example situation could be: a senior is dissatisfied with an excursion or the accommodation facilities, deadlines were not kept or, after an accident, claims for damages were not asserted. Here, as a senior attendant, you should be familiar with above all the rights and obligations of the company, in order to be able to assign appropriate priority to aspects such as fair dealing or compromises. If the company is absolutely in the right, fair

dealing may turn out to be substantially smaller than with the reverse case. In principle, as an attendant, you should be able to appropriately react to conflicts in all variations, in order avoid escalations, dissatisfied clients or negative client experiences.

4.3.5 Accompanying evaluation

Several surveys were conducted within the framework of the accompanying evaluation with the project participants and the participating individuals. These took place at the beginning of the training course phase in March 2010, at the beginning of the practice phase in May 2010 and at the end of the auxiliary qualification in July 2010. For the results, reference is made to Section 6 - "The effects of the auxiliary qualification".

4.3.6 Certification

With this project, which was meant exclusively for older employees and the continuing education for which took place during the work process, at the end, there should be a project thesis as documentation. The examining authority was the Garmisch-Partenkirchen Adult Education Centre. The examination committee was staffed with members who had been intensively entrusted with the "senior attendant" auxiliary qualification.

The examination procedure after completion of the auxiliary qualification consisted of a written component (project thesis) and an oral component. The criteria of the project thesis included, among other things:

- development of the capability of expression for the transmission of the expert knowledge to persons outside the occupation
- presentation and treatment of a complex task
- linkage of already existing specialised knowledge and newly acquired knowledge
- that, regarding the file of the letter, the participants become aware of a great deal of implicit knowledge and realisations.

In addition, the documentation should be conducted and handled as a reference process. In addition, the option was granted to also conduct certain focuses as component processes, if they were not otherwise solved at work.

Furthermore, the examinee is to prove that he or she

- can independently plan and implement work processes on a goal-oriented basis under consideration of commercial, technical, organisational, chronological and quality-assurance guidelines
- can process problems and conflicts and present their solutions
- can present and evaluate general commercial and client-oriented connections from his or her field of activity and occupation

- can handle clients in a manner that suits the situation
- master the presented work processes in connection with the occupational action for the future
- can demonstrate a presentation of the product (product formation) geared to the client.

The oral defence of the project thesis formed the conclusion of the examination procedure. The participants had to prove their rhetorical abilities regarding the newly acquired knowledge.

4.4 The learning process

4.4.1 The qualification modules

In this place, the learning material is introduced. With its assistance, the learner should be put into the position to become familiar with the component processes, acquaint himself with their developments and, through the use of additional auxiliary material, acquire the necessary expertise and capabilities on an independent and solely responsible basis. This is to take place in approximately 48 hours in the form of directed learning. The flow charts and descriptions are to thereby serve the purpose of structural assistance. Through examples, the learners are to be provided specific implementations and situations, in order to ensure the transfer of the component processes into practice. Adjustments and modifications are thereby inevitable, but represent further expertise of the learners and advanced training. Literature and Internet links, and also learning consultation and the support of specialised educational personnel, guarantee a successful learning process, and questions that arise are immediately answered.

The following now illuminates the overall process, with its component aspects:

4.4.1.1 *Client acquisition for the target group of traveling seniors*

The first task of senior support consists of addressing and acquiring clients. Older persons should be contacted either personally, by post or even over the Internet. The pro and cons of the contact media should be weighed prior to their use. In various manner, current offers may be submitted to older persons, and prospective clients may be informed of the various aspects of the trip (such as costs, additional services, etc.). A prerequisite for this is a multitude of capabilities, expertise and information, of which the senior attendant should have a command and knowledge.

With all forms of client acquisition, it is particularly important to provide the seniors with contact data, so that they may contact the senior attendant at any time for any further inquiry. Value should always be placed on the type of communication that is geared to the target group, which identifies and considers the corresponding preferences and desires, and also fears and obstacles.

Relevant information that should be imparted upon the acquisition:

- costs
- destination and accommodation facilities
- period of time and duration
- particular services
- contact data for booking and further inquiries

Materials of the senior attendants:

- handouts, flyers and brochures
- a simple and attractive website
- additional professional contact persons

Capabilities of the senior attendants:

- solid consulting capabilities
- knowledge of all offers and costs
- social and communicative expertise
- a high degree of openness and friendliness
- knowledge of the target group of seniors

The following concepts are to be mastered:

social expertise, communication, consultation, knowledge of the target group and the offers
→ possible learning material and methods: handouts, training exercises, coaching, role playing exercises, video sequences, good and bad practice examples

4.4.1.2 *Arrival and departure trips of seniors*

An important component of organisation exists in arrival and departure trips to and from the destination and the corresponding accommodation facilities. Depending upon the mobility of the traveling seniors, various options should be offered to the traveler also here. Independent arrival and departure trips, a door-to-door a service or only one arrival or departure trip are conceivable combinations. Moreover, arriving in the group by bus, train or the like are possible variants. What service the senior would like to draw on should be specified as early as booking, and an initial consultation by the senior attendant should take place as early as this

point in time. Moreover, the transportation options locally, during the holiday, should be given with equal information. For seniors with reduced mobility, auxiliary services (such as transport with wheelchairs and lifting devices or similar alternatives) are offered. Pick-up times are able to be changed flexibly and spontaneously, and luggage transport with a stretcher service may likewise also be used.

Relevant information that should be imparted upon the organisation of arrival and departure trips:

- means of transportation and times
- luggage service
- trip duration and process
- options for additional services for the handicapped or persons with reduced mobility

Materials of the senior attendants:

- information material
- price lists for services
- maps and routes

Capabilities of the senior attendants:

- solid consulting capabilities
- knowledge of all offers and costs
- social and communicative expertise
- a high degree of openness and friendliness
- knowledge of the target group of seniors

The following concepts are to be mastered:

Facts regarding the travel routes and duration, along with the means of transportation and their specifics, capabilities of communication, consultation, knowledge of the target group of persons with handicaps or other restrictions

→ possible learning material and methods: handouts, training exercises, coaching, role playing exercises, video sequences, good and bad practice examples

4.4.1.3 Internet, EDP and information processing

As with many other processes, prior to the selection and the start of a trip, there is initially the necessity to obtain all relevant information. Since, for the provision of services, both the services and corresponding prices are relatively flexible and can rapidly change, the employment of PCs, the Internet and EDP-supported programmes are gaining increasing influence. For senior attendants, this facilitates acquiring information in a manner that saves time and resources. Thus, either general sources of information (such as search engines and websites of specific vendors) or special, access-limited databases of travel vendors, suppliers, etc. are used on a timely basis. However, in order to ensure an adequate use of such options, the senior attendant must be able to work with both the corresponding hardware and software. Upon the later forwarding of corresponding information, the senior attendant should be informed of the particulars of the information treatment of older persons and be able to include and implement such in presentations. The attendant is sensitised to typical fears and hin-

drances, and can therefore avoid and/or disable these. How extensive the hardware and software of PCs must be dealt with depends on the status of expertise and prior knowledge of the participants and can vary quite strongly between the individual persons. This component process can also be applicable in the creation of age-appropriate PC work stations for employees and guests.

Relevant information for handling PCs and information presentation geared to seniors:

- options for the provision of information (general or industry-specific, as the case may be)
- handling the necessary hardware (e.g., keyboard, printer, memory, etc.)
- handling the necessary software (software varies depending upon type of provision of information)
- special data processing (e.g., Word, Excel, etc.) and presentation programmes (PPT, Photoshop, etc.), along with interactive media (e.g., chat, forums, etc.)
- information on the particulars of PC and Internet use and/or upon the presentation of information to older persons (e.g., avoiding abstract images, red instead of green/blue, changed capabilities of the sensory organs, etc.)

Materials of the senior attendants:

- corresponding hardware and software
- material and programmes for information presentations
- possible access data for special sources of information

Capabilities of the senior attendants:

- basic technical understanding
- basic PC knowledge
- empathy, ability to change perspective
- basic understanding of aesthetics for presentations
- communication ability and social expertise
- flexibility and creativity
- implementation of preferences and particulars of the target group upon the provision of information and presentation

The following concepts are to be mastered:

Knowledge on the handling of PCs along with the corresponding programmes, information on data processing for older persons

- ➔ possible learning material and methods: literature, training units on the programmes and the software, project entitled "Gathering Information on a Topic and Presenting to Seniors"

4.4.1.4 *Facilities geared to seniors*

Facilities geared to seniors are very important items in the offer. Each traveler spends a very large part of his or her stay in the facilities of the hotel, courtyard or the room. Therefore, it is relevant that the rooms, the bath and the exterior installation and the premises of the food supply are arranged in an age-appropriate manner. There should be barrier-free facilities, for which bed, showers, etc. were conceived in a manner appropriate for older persons and the handicapped. There should be no obstacles such as stairs, heavy doors or the like, or they should be surmounted by seniors with appropriate assisting resources (lifts, stair lifts, etc.). Building entrances, entrances to terraces, dining halls and other areas should be attainable and usable in the same way for all travelers. Through assisting resources (such as, for example, grips, ramps and high beds), the needs and comfort desires of the seniors should be realised and implemented to the greatest degree possible. Safety regulations on escape routes and fire protection must naturally be adhered to. Moreover, in order to facilitate a stay for seniors requiring nursing care, appropriate conditions for nursing and hygiene should be provided.

Relevant information for staying in suitable accommodations:

- specialised nursing knowledge
- weak points and deficits in the structural realisation in the particular accommodation facilities
- age-relevant demands in terms of furniture, areas and entrances
- options for resources and supporting products
- expectations and needs of older persons for the facilities
- physical complaints that typically arise for older persons

Materials of the senior attendants:

- brochures and inventory lists of resources for the supporting management of everyday life during the stay
- information on corresponding extensions and changes

Capabilities of the senior attendants:

- empathy and the ability to change perspective
- technical skills and/or creative problem-solving ability
- organisational ability

The following concepts are to be mastered:

ability to change perspective and empathy, organisational ability

→ possible learning material and methods: role playing exercises, training units and examples

4.4.1.5 *Food supply*

For older persons, in addition to basic requirements such as balanced, healthy and fresh nutrition, attention should be paid to additional aspects. Many older persons suffer from incompatibilities, allergies or also from illnesses, the course of which is considerably affected by the nutrition. Whether allergies, incompatibilities, etc. exist should be clarified as early as the booking or at the latest of arrival at the accommodation facilities. With the food supply, large

time periods for meals should be allowed; what dish contains what ingredients and for what persons it is suitable/unsuitable should be clearly marked. This may be accomplished, for example, with small coloured cards with labels. It is also important to provide a large selection for all seniors. There should always be calorie-reduced, sugar-free alternatives to the particular dishes. Healthy snacks (such as fruit and vegetables) and alcohol-free beverages should always be accessible and attractively presented. Additional services (such as measuring sugar, feeding the older persons and consultation in the selection of the meal) are likewise quite meaningful. Moreover, the taking of medicine is not specifically controlled, but recalled in memory. Interim meals, such as a coffee break with cakes, are to be offered. Through cooking courses and special seminars on methods of processing and preparation, the food supply offer may be expanded as required.

Relevant information on the food supply of older travelers:

- scientific nutrition and medical findings
- individual needs, prohibitions and characteristics of the seniors
- basic knowledge of cooking and preparation

Materials of the senior attendants:

- food
- documentation of data regarding incompatibility, allergies, etc.
- corresponding markings on meals

Capabilities of the senior attendants:

- tactfulness, sensitivity
- basic medical knowledge, in order to identify food not favourable for specific illnesses
- reading between the lines, if from shame, ignorance or simply from the attempt of concealment, correct information is nevertheless obtained (ex.: obese senior does not reveal the medically ordered diet)
- communication and consulting capabilities

The following concepts are to be mastered:

consulting and communication expertise, knowledge of nutrition and various medical aspects,

documentation options for information; reciprocal effects of food and drugs

→ possible learning material and methods: handouts, technical literature, training units

4.4.1.6 Excursions and entertainment

Traveling seniors do not want to leave the environment to which they are accustomed, in order to stay overnight in other living quarters for just a few days. During this period, they also want to experience something, undertake excursions and be entertained. Such excursion and entertainment programmes may be planned and conducted equally on an individual basis or in groups. From a multitude of offers, the seniors may select those that correspond to their mobility, desires and ideas. In addition to sporting offers, cultural activities and creatively designed activities should also be contained in the offer. Through the use of resources such as wheelchairs, walking frames and engine-operated mini-scooters, even less mobile older persons can keep up with the group and participate in the offers. Generally, a good

care rate should be ensured through sufficient supporting and qualified personnel. Pre-planned ventures, such as bingo evenings, dance events, city tours, etc. should be oriented to the interests of travelers. Space for spontaneous ideas and individual excursions, along with transportation facilities, etc. are to be made available for this purpose. It is the task of the senior attendant to assemble excursion destinations, entertainment options and activities that are geared towards the target group, and to provide consultation in their selection. For further inquiries and organisational matters, the attendant is to obtain the relevant facts and compile the costs that arise in one cost estimate. The offer may be further enriched through insider tips; in doing so, the seniors feel even more appreciated and in good hands. Bad weather alternatives should be at the ready, and statements regarding the use options for wheelchair users, etc. should to be made.

Relevant information for excursions and ventures:

- use conditions of individual excursion destinations are known
- costs and services
- preferences, desires and interests of the seniors
- obstacles, inhibitions and fears
- degree of mobility and fitness of the individual older travelers
- seasonal excursion and entertainment options

Materials of the senior attendants:

- tourism brochures
- information on public means of transportation, prices and operating hours
- data of the travelers regarding preferences, etc.
- maps and pictorial material

Capabilities of the senior attendants:

- attentiveness and empathy
- organisational ability
- consulting expertise
- enthusiasm ability and convincingly disabling the occurrence of fears and doubts by the seniors
- flexibility and spontaneity
- problem-solving ability
- ability to change perspective

The following concepts are to be mastered:

organisational ability and problem-solving ability, techniques of motivation and dynamisation, provision of information, processing and treatment

→ possible learning material and methods: training exercises and coaching

4.4.1.7 *Additional services for older travelers*

In everyday life, many older persons have created a life for themselves in which they have postponed other obligations outside of their working lives. During the trip, such obligations must continue to be fulfilled within the framework of the additional services of the senior at-

tendant or other service providers. Thereby, a further task of senior support exists in organising that, during the absence, flowers are watered, the mailbox is emptied and pets are cared for (as examples). This type of service is to be considered optional, since it is possible that they could also be taken over by the relatives, neighbours or other persons from the periphery of the travelers. However, if the seniors live alone, they should have such options available, so they can begin a longer holiday trip without stress. In addition, there is an option for further use if other longer absences are pending, such as for instance stays at health spas or hospitals. Alternatively, it is also possible for the accommodation facilities to be open to pets, which means that dogs and cats are simply taken on holiday and are likewise cared for. Medical and nursing assistance likewise falls into this area. Thus, a high degree of flexibility arises, because (for example) a senior who cares for her very old mother at home may travel on holiday together with her, and both may be supplied and cared for in the appropriate measure. Thereby, the often immobilising "guilty conscience" is satisfactorily calmed. Moreover, there could be a realisation of more minor services that are close to the hearts of older persons, like sending birthday greetings in the form of flower bouquets, etc.

Relevant information for an offer of additional services:

- existing needs
- information options
- various service companies
- costs of services
- legal guidelines and prohibitions
- arrangement with members, etc.

Materials:

- information sources and media
- information and illustrative material
- examples of good practice

Capabilities of senior attendants:

- flexibility, openness and spontaneity
- provision of information, data processing and aspects of information preparation and presentation
- organisation of all necessary steps and processes
- assertion of client requests, even against resistance
- maintaining an overview of the overall offer, designing and combining offers according to client requests

The following concepts are to be mastered:

searching, processing and imparting information, presentations of the information corresponding to the target group, conflict management

→ possible learning material and methods: handouts and technical literature on the media and information options, training exercises and coaching

4.4.1.8 *Issuance of an offer*

After, in the preceding component processes, the attendant has obtained all relevant information, it is now the time to issue to the client an offer with all of the components of accommodation, food and excursions, up to the additional services. Thus, the traveler receives a presentation of the costs that will arise for him if the trip commences. Of course, such an offer is still not a fixed contract, but can still be further changed if necessary.

Upon the issuance of the contract, it is very important to ensure transparency for the client. All inflowing components, with their costs, must be clearly evident. Moreover, costs such as value-added tax, fees, etc. must be shown. Only through this can clients feel completely informed, and can make decisions in their full responsibility. Thus, misunderstandings and withdrawals from contracts are avoided from the beginning, which could in turn lead to client discontent.

Relevant information that is relevant upon the issuance of an offer:

- all information on the aspects of the arrival and departure trips, accommodation, food supply, excursions and ventures along with additional services, with their costs
- contact data for booking and further inquiries
- reservation contacts

Materials of the senior attendants:

- handouts, flyers and brochures
- a clear and legally error-free contractual document

Capabilities of the senior attendants:

- solid consulting capabilities
- knowledge of all offers and costs
- social and communicative expertise
- a high degree of openness and friendliness
- knowledge of the target group of seniors

The following concepts are to be mastered:

social expertise, communication, consultation, knowledge of the target group and warranties, general business terms and legal aspects of the offers

→ possible learning material and methods: handouts, training exercises, coaching, role playing exercises, video sequences, good and bad practice examples

4.4.1.9 Pricing, accounting and bookkeeping for senior support

To ensure cost effectiveness and profit, a senior attendant must be able to issue the correct pricing of offers. Moreover, accurate accounting and bookkeeping are important components of the finances of a company. If the order for the issuance of an offer (e.g., for a day trip of a senior travel group) is accepted, as the attendant, you must be able to itemise and justify a corresponding pricing of the costs. As with the work of the senior attendant, specific aspects of the target group are to be included in the pricing. For example, for the specified day trip, in addition to normal transportation costs, possible rental fees for assistants or wheelchairs must be considered. Or, with the food supply, attention is to be paid to the special costs for diabetic menus or food for allergy sufferers. In the accounting, typical habits of older persons (such as paying in cash) should be considered and facilitated. In the bookkeeping, questions

of taxation and confirmation likewise will have to be clarified. The contents of the pricing, accounting and bookkeeping are repeated, since it may be assumed that, in existing companies, such processes were already undertaken. Therefore, contents are imparted primarily by means of literature.

Relevant information for the pricing, accounting and bookkeeping of senior support:

- information on services and offers with associated prices and conditions
- accounting and/or payment options
- documentation and confirmation forms, and/or conducting verification
- guidelines regarding taxes, duties, etc.
- accounting, bookkeeping, and pricing programmes that are used

Materials of the senior attendants:

- software and programmes that are used
- guidelines, laws and regulations

Capabilities of the senior attendants:

- command of basic commercial knowledge
- mathematical capabilities
- transparent presentation and/or documentation

➔ possible learning material and methods: working on model cases with the corresponding programmes, or receiving such

4.4.1.10 Obtaining of feedback and follow-up care

So that the senior attendant can optimise and improve his or her work, it is necessary to obtain feedback directly from the client. This can happen in writing or by telephone; with the telephone, one has the advantage of making more targeted inquiries. Thus, the client feels assisted further with his or her opinion and evaluation, experiences a solid all-around service and may, through the evaluation, contribute to shaping consistent quality improvement, from which he or she may himself or herself also profit. For the feedback, there are questions regarding all trip components, in order to find potential for improvement. However, such process should take place not too long after completion of the trip, so that the interviewee remembers all information and maintains a connection to the service. Through completing a record of the discussion, the information is still accessible at a later point in time; in doing so, aspects of data protection must be considered, and any documentation presupposes the consent of the client. At the end, it is conceivable to ask the traveler whether future contact for the sending of offers and information is desired. Thus, there is still contact with the client, and thus it could be possible to enter into new contracts. With the assistance of the

information from the database, the information that is sent can be coordinated specific to the clients and his or her requirements.

Relevant information for obtaining feedback and/or for follow-up care:

- Trip duration and destination
- Information on the trip that has begun (concluded contract)
- Receipt of complaints, availing of warranty services, abandonment of the trip or other complications

Materials of the senior attendants:

- concluded contract
- contact data of the client
- client card index or the like for entering of feedback, client data, etc.

Capabilities of the senior attendants:

- knowledge of all offers and costs
- questioning techniques, conducting interviews
- social and communicative expertise
- a high degree of openness and friendliness
- knowledge of the target group of seniors

The following concepts are to be mastered:

social expertise, communication, knowledge of the target group and the offers

→ possible learning material and methods: training exercises, coaching, role playing exercises, good and bad practice examples

4.4.2 Examination process

The examination process was opened with the examination committee's issuance to the participants of the emphasis for the senior support project. Although the participants came from the different areas of the hotel and food trades, the guidelines for the client consulting project were identical for all. The first step on the project thesis should be issuing a project sketch, which should contain the following:

- an understandable description of the idea for the project on senior support
- a rough schedule of timing and organisation of the implementation
- signature of the contractor for agreement to the project thesis

After the provided deadline, the project sketch was submitted to the adult education centre, and evaluated and released by the examination committee responsible there.

The documentation should contain a presentation of the whole reference process during the project thesis. It is to be verified through the documentation that the participants are able to assume the following tasks in their sole responsibility:

- 1) acquisition of potential clients
- 2) planning of arrival and departure trips
- 3) obtaining and presenting information with PCs
- 4) facilities geared to seniors
- 5) food supply
- 6) excursions and entertainment
- 7) additional services
- 8) issuance of offers
- 9) pricing, accounting and bookkeeping
- 10) obtaining of feedback and follow-up care

After delivery of the project thesis, the evaluation took place through the examination committee. As a conclusion, an oral examination was intended for all participants, the topic of which is presented in the defence of the project thesis. An oral presentation of the project, and a specialist discussion tied to the fact several discussion phases could exist, were to take place. The documentation of the project thesis was clearly the focus upon the evaluation.

5. Implementation and process of the advanced training course

5.1 Recruitment of participants

Implementation steps for the recruitment of participants:

A great challenge was the sensitisation of companies to the "senior attendant" auxiliary qualification. Thus, in a period of approximately 2 months, about 17 businesses were addressed in various ways. The acquisition activity was effected through personal contacts and flyers. Many businesses were personally visited in order to have discussions with them regarding "aging workforces". In this connection, an important aspect of the organisational culture is the treatment and the continuing education of older persons in the company.

It was remarkable that, despite a positive appreciation of their older employees, companies were not prepared to release employees for an advanced training course.

Ultimately, there was success in finding 3 motivated employees and starting them with the project. The participants received the necessary support from their companies, and were included in the new fields of activity.

According to statements of the business owners, positive reasons for the continuing education were the following:

- difficulty in finding good employees,
- assumption of new tasks in the company,
- continuing education as an important aspect in the organisational culture,
- linking specialised knowledge with new knowledge.

Likewise, there were various reasons for non-participation, such as

- flack of need in the activity field of senior support,
- no older employees,
- the company is too small,
- release for the on-site phase is not possible,
- continuing education is interesting only in the specialisation.

On only the latter point, it must be added that the product and service must be naturally harmonious.

5.2 Implementation of the advanced training phases

The process of the advanced training course is subdivided into four substantial method steps. The following presentation shows the events of the advanced training course in its chronological succession. While, in this section, the activities are initially described and only isolated results are specified, they are found in sections 6 and 7.

Step 1: Introduction to the options of the learning environment

Independent learning presupposes for the learners that they are able to become familiar with and use the options and resources offered to them for learning. For the support of self-directed learning, a learning environment was arranged for the advanced training course,

- in which they could contact specialised experts for technical questions. For companies that do not have their own education department (such as, as a rule, KMU), the concept of work process-oriented continuing education provides that the function of the learning attendant can also be administered by external education vendors. For the participants in the advanced training course, specialised lecturers were available at the workplace within a chronologically defined framework for support upon technical questions and problem solutions upon conducting the senior support project. They are to give support in the coordination of the subject-specific project activities for company-specific particularities.
- in which they were supported by learning consultants for handling the elements of the learning environment (literature, reference process, component processes, etc.) upon questions for the project planning and conducting and upon questions for test preparation.

For the conducting of the senior support project at the workplace, the participants initially received information on the working material of the auxiliary qualification.

Conception and implementation of the course introduction event

In order to make the participants with the specified elements aware of the learning environment, the adult education centre conducts an introduction event for occupation-supporting advanced training. The two-day event above all served the purpose of sensitising the participants to the action field of senior support (while giving effect to their prior occupational experience), providing them with an initial introduction to the topic, describing to them the proc-

ess of advanced learning and making them aware of the elements of the self-directed learning environment.

With the event, there was a solid introduction to the auxiliary qualification. Nevertheless, it turned out that the method for the participating individuals, who come from various occupational contexts, demands a high degree of readiness for the implementation of the workplace-related learning form. Moreover, for the project participants, the task arose to, within the process of advanced training, make available for the participating individuals continuous consultation that satisfies their demands, in order to manage these requirements.

Step 2: Appreciation of one's own status of knowledge and one's own expertise in the area of senior support

After, within the framework of the two-day introduction event, the participants had become familiar with the elements of the learning environment (literature apparatus, specialised experts, learning consultants, reference project / component processes), a senior support project was conducted for them as an example for the introduction to the topic. Thereby, the participants and the lecturers were to receive the option of, on the basis of the handling of a consulting assignment designed in line with practice, understanding the level of knowledge on the topic. From the introduction project, conclusions on the learning need were drawn from the advanced training group.

The handling of the tasks should make it possible for the participants to, through specific actions, have their own experiences regarding their existing abilities and their learning needs in senior support. At first, the participants completely carried out the following: with priority, they worked on the aspects of the setting of tasks that they could master against the backdrop of their existing abilities and their occupational experience. In contrast, for the handling and/or testing of "new" portions of the tasks, even more time is to be made available in the course event in the future, in order to be able to work out the learning needs with the participants on a more targeted basis.

Step 3: Acquisition of knowledge bases on senior support (running parallel to Step 4)

It was assumed that that participants in the advanced training course, based on their learning biographies, would not be so easily able to learn completely independently from the beginning of the advanced training course. For this reason, a gradual process from the rather external-directed learning to self-directed learning was carried out. Before the participants independently carried out a senior support project at the workplace, they received course instruction on the communicative, legal and commercial bases of senior support. This concerned a learning phase, which, depending upon the personal confidence of the participants, was already overlaid chronologically with the preparation and conducting of the support project.

Overview of the specialised topic groups:

- Time management and self-management
- Consultation and communication

- Medical aspects
- Client orientation
- Complaints, conflicts, law and liability

Step 4: Independent planning, conducting and documentation of a senior support project at the work place (currently running in parallel to Step 3) and reflection on the consulting activities within the framework of the examination discussion

At the latest upon the commencement of the actual project phase (from May 2010), the participation independently conducted their senior support project at the workplace. In the model project, just like in the work process-oriented continuing education in the IT industry, the following objective was pursued: "Through the integration in the work process, high motivation (work on genuine projects / tasks) and sustainability are achieved not only for the continuing education courses, but it is also the case that – from the view of the company – continuity and quality of the ongoing work are secured."²¹

The phase of conducting, implementing and documenting the senior support project, along with the examination discussion, are considered under the following aspects:

a) Characteristics of the advanced training process

Here, the degree of the support was observed by the company (endorsement of the continuing education process in regards of content, support in organisational aspects such as release for the advanced training and consultation). From the perspective of course coordination, such support was provided in all cases.

Comparatively, the learning consultation was frequently used. All participants used the consulting offer in a well-balanced manner.

b) Process of the provision of services

3 participants prepared a project sketch and submitted these to the examination committee for their appraisal. They took part in the oral examination procedure of the Erfurt Chamber of Commerce and passed the examination.

²¹ Mattauch, W. / Fraunhofer Institute of Software and System Engineering: Reference Profile of IT Business Consultants, p. 5

6. The effects of the auxiliary qualification

6.1 Effects from the view of the participants

For the majority of the participants, the advanced training course was aimed at the preparation of taking over new tasks or the expansion of previous tasks in the consultation and support of older clients and corresponding service and care companies. Participation mostly took place within the framework of a relevant request via superiors, but these were nearly unanimously appreciated and, for the participants, corresponded to an interest in the topic along with a fundamental interest in continuing education. Additional aspects were

- the assumption of greater security of keeping the job
- the assumption of an improved position on the job market
- the prospect of reduced stress at the workplace

Moreover, from the perspective of the employees, reasons for the advanced training participation were therefore of importance. The mostly existing self-motivation concerning interest in the topic, along with job protection, may be assumed as favourable determinants for the project course and success in learning. In a similar relation as from the view of management, a reduction in stress was confirmed as the reason and thus the meaningfulness of the project intention.

Overall, for the participants, the auxiliary qualification was in connection with a change of tasks. However, according to the data of management, in none of the businesses were formalised status changes and/or any occupational promotion intended.

With a view of the specified motives, in addition to the operational development (structure, development and/or improvement of the addressing and support of (new) client groups), the advanced training course should thus also support the direct change to the occupational action field.

It has already proved to be the case during the continuing education course that the participants were already able to use the subject matter being taught (sometimes) and used a new and/or improved procedure in senior support.

6.2 Effects from the view of additional actors

From the view of the assigning companies, the following aspects were useful for the operational processes:

- improvement at the level of communication
- improvements at the technical level
- improvement in work organisation processes
- positively changed understanding of work and tasks
- personal advancement of the participants

The statements make clear that the continuing education course was selected by the companies for very different reasons. It served the purpose of both operational development and the development of selected employees. Here, that the given minimum age (50+) dominates the selection confirms the effectiveness of an age guideline for the promotion of older employees. In addition, the specified reasons of the central intention of the project open up new fields of activity for older employees, and thereby secure their employment and/or reduce health stresses, and thereby show that there is a real need for this.

To that extent, for the participants, the continuing education course has a direct effect on the occupational action field in the sense of a change of activity or a supplement to tasks, which should be facilitated and/or supported by the continuing education course. The fact that, at the same time, this also succeeded clarifies the positive estimates for the already ascertainable transfer of the subject matter being taught and the multitude of specific examples.

6.3 Qualitative aspects

To a great extent, the introduction stage and the introduction project were assessed as positive: the imparting of an understandable overview of process and topics of the advanced training course, the imparting of an understandable view of the desired learning at the workplace and in the desired independent learning, the imparting of the importance of the advanced training topics through practical exercise and a sufficient consideration of the discussed desires of the participants were met with considerable assent in each case.

The training course phase was assessed by the participants as technically and methodically positive: imparting of expertise, pleasant discussion climate and – considerably – a realisation of all aspects that were specified as expectations and point to the application of age-appropriate instruction (see above).

More critical aspects referred solely to the complexity in terms of content and time of the instruction, which was assessed by half the participants as too complicated in terms of content (partially) and too compact in terms of time (partially) and/or too long-winded (partially). Nevertheless, the evaluation of the instruction and the lecturers of the overall training course phase turned out to be unanimously positively.

The varying levels of prior experience in work with older clients and/or in senior support creates great challenges in the design of instruction in the training course phase. Expectations and desires expressed in this connection by the participants correspond to scientific findings regarding older learners and confirm the approach of age-appropriate instruction conceptually provided in the advanced training course.

The training course phase was mostly estimated as quite positive that expectations formulated by the participants could be designated as realised. The complexity of instruction in terms of content and time was noted. Moreover, on the part of the lecturers, notes were made on difficulties, considering various learning needs (avoidance of overdemanding / undemanding).

The form of learning in the practice phase was essentially evaluated as positive: the practical implementation of the subject matter being taught, the independent treatment in terms of content, the independent planning and conducting of the individual work steps along with the practical approach to everyday work life.

However, as exhaustive were the independent search for necessary information, material and literature, the solely responsible timing for the work on the senior support project and the learning on the job was specified. Such aspects thereby affect both the specified time problem, and elements of independent learning endorsed in principle and the concentration problems at the workplace specified in the feedback round, also upon chronological free space, "freely obtaining the head for the documentation".

In the result, the estimates make clear a relatively high acceptance of the work process-oriented learning form, together with, for those accustomed to learning and/or self-organised learners, some trust up to the amount of resentment that is to be expected.

On the part of the management, the work process-oriented learning form in the practice phase with a view of the practical approach to everyday work life, the independent learning and learning at the workplace were nearly unanimously assessed as positive.

The practice phase was regarded by the majority of participants as a valuable addition to the training course phase of their learners.

The practice phase enjoyed an even more positive resonance from management, which considered such meaningful as an addition to the training course phase. Thus, it was expressed, for example, that "the triangle relationship between client, boss and employee intensively impacts learning processes" or that it "constitutes an enormous difference whether one moves within the protected instruction framework or acts for the client".

The conducting and documentation of the senior support project were essentially easy for the participants; however, time problems were identified.

In the result, the working material and the learning consultation proved to be satisfactory.

The work process-oriented learning form encountered – with individual and problem-oriented aspects – relatively high acceptance from the participants: among other things, the practical implementation of the subject matter being taught, the independent treatment in terms of content and the practical approach to the everyday work life were mostly assessed as a benefit. On the part of management, the assent to the work process-oriented learning form turned out even higher.

As a whole, the practice phase was regarded by the majority of participants as a valuable addition to the training course phase of their learners. This positive judgement is even exceeded by that of management.

7. Summary

The project approach - securing the employment of older workers through a changeover to consulting activities (here, that of senior support) - is, according to the unanimous view of the participants and the nearly unanimous opinion of the management teams for the entire industry in question, generally possible for their operations.

In individual cases, this affirmation was attached to certain conditions (such as, for example, qualification / professional experience, EDP knowledge). Further it was noted that the selection of personnel for such an advanced training course also presupposes confidence in the ongoing commitment to the company, since the employees that have undergone advanced training are also independent, and could support the future competition through such advanced training. It was also pointed out that, in smaller companies, an exclusive changeover to senior support was not possible, but this could be perceived merely as a secondary matter.

An additional effect on employment that would not benefit the companies involved, but would probably benefit the participating employees, is to be assumed in an increase in employment opportunities at other companies. The participation in an advanced training course, the ability to present a successfully taken examination and the assumption of new task areas / functions signal, in addition to the qualification aspect, a readiness and ability that is also present in higher ages, and – even more important – is proven, to adjust to new requirements (which inevitably arise upon starting a new position). In fact, participants at the end of the advanced training course recognised that the advanced training course had increased their opportunities for employment at other companies. The importance of the option for an examination at the conclusion of the advanced training course was confirmed by a majority of management, and the acceptance of the examination was emphasised by the adult education centre as a recognised institution.

7.1 Conclusions

In evaluation of the implementation, it can be concluded that the concept of the occupation-supporting auxiliary qualification of "senior attendant", tested and developed by model, proved to be sensible, and at the same time was designated as quite challenging. The latter refers not only to the development and implementation level of the advanced training course, but also to the motives and resources – not only in regards of time – that the participants and management must contribute. Innovative elements, which proved to be sensible, are particularly the facilitating of advanced training and examinations for the target group of older employees, the integration of age-appropriate instruction into the instruction organisation of the training course phase, the work process-oriented learning form of the practice phase along with the learning support through the developed working material and the learning support.

At the same time, from the process observation, interviews and discussions, experiences and suggestions were able to be gained, which should be considered in the event of the repeated conducting of this advanced training concept.

7.2 Proposals for modification

Framework concept

- The training programme and contents of the training have proved to be satisfactory and should be continued in the basic concept; however, they should be examined regarding complexity, in order to avoid any overdemanding and/or undemanding of the participants. The following would be conceivable:
 - a) a high weighting on self-learning, the prerequisites of which (e.g., through a learning agreement) could be more strongly supported, and
 - b) the possibility of offering to the participants individual modules as auxiliary modules as required, e.g. as posting of individual hours in other seminars of the project agencies or in cooperation with other education centres; the modules could be used for deepening in the individual topic fields of senior support, or cover topics going beyond this, such as PC use, basic business management knowledge, etc.Both methods could be offered as alternatives or in addition to one another; the latter would offer to businesses and participants the option, depending on their learning need, of selecting whether they would like to select the path of self-learning or the additional optional modules.
- As advanced training for the target group of older participants, a need for computer training, recognised in the model project at the beginning of the course, and a training course offer thereupon made possible on short notice, are to be integrated in the future conceptually and as a need-related auxiliary offer.
- Conceptually, a partial integration of theory and practice phase should be undertaken, which could be commenced with introducing seminar days, continue with theory and practice elements partly running in parallel and conclude with evaluating seminar days. In this way, the project sketch and the practice project could commence earlier and develop gradually, the technical consultation could be used by lecturers within the framework or at the edge of the seminar days running in parallel, and the processing time could be extended for the practice project upon need (e.g., with the necessary need for time in the decision-making process of the seniors to be supported) and/or more strongly oriented to operations-specific processes (e.g., points of capacity utilisation).
- To examine and reflect on the transfer of the subject matter being taught, the offer of holding an analysis meeting would be desirable in a certain interval of time after completion of the advanced training.

Learning environment

- The use of the learning environment for self-directed learning should be more strongly moved into the focus; e.g., through references and explanations in the instruction and in the learning consultation.
- The learning consultation has been proven to have value; however, it should supplement your consultation for the participants who are partially accustomed to learning around the topic: introduction to learning and work strategies.

- Technical consultation should be developed further: on the one hand, a stronger assumption of responsibility of management / superiors as contact persons appears sensible, if they already functioned in the model project as important support. On the other hand, a technical consultation by lecturers should be able to be taken up more easily within the framework of accompanying the recommended integration of the theory and practice phase. For project work after conclusion of the theory phase, fixed days should be offered.
- The possibility that is already offered of bringing up for discussion technical (EDP-referred) problems of the project documentation within the framework of the learning consultation, and using computer work stations, should be continued. Additionally, regarding the concentration ability for the production of documentation at the workplace (which is sometimes identified as difficult), it could be examined whether days designated for the project documentation are offered at a central location, outside of the operations with PC access.

7.3 Perspectives of the approach

As described in chapter 6, the acceptance and the use of the modified APO approach of occupation-supporting and workplace-oriented continuing education lies under both methodical instructional and operational aspects

- in linking existing knowledge and abilities of the participants
- in the high degree of the self-determination in the learning process
- in the accompanying learning consultation
- in the elevated practical approach of learning contents.

For the future, further use of the approach, for the importance increasing in the future of occupational education in the operational context, we see the following potential:

- occupation-supporting and workplace-oriented forms of the operational (continuing) education make possible positive effects for the operational learning culture:
 - the learning with and examination of the internal work process are visible; quality and innovation potentials are unlocked
 - the proximity of learning and occupational actions are visible; process optimizations may be unlocked
 - the approach of occupation-supporting and workplace-oriented continuing education is age-neutral and is thereby suitable in a special way for age-mixed learning groups, which mostly occur in operational learning situations
 - in "system operations", impulse is given the fact that learning is not an external process, but probably has to do very closely and specifically with the subject matter of the particular work challenge

- learning times may be handled flexibly and thereby correspond particularly to the operational need
- that the approach underlying the "BusQua" project offers good possibilities of linking procedures of documentation and certification of knowledge and talents, which were acquired in the process of the work
- with corresponding modification, the approach may even be transferred to additional target groups, for example unemployed persons