



Age Management in Practice (AMaP) Project
Project no. 518590-LLP-1-1-UK
Minutes of 3rd Partnership Meeting – Porto, Portugal

Date: Thursday 18th & Friday 19th October 2012
Venue: Hotel Carris, Porto, Portugal

Participants: Graham Smith, Brian McKechnie & Alice Morton (UoS, UK); Gunther Ring (GEB, DE); George Stefan (LLLRI, EL); Dorota Kowalska & Paulina Wójcik (Semper Avanti, PL); Alexandra Cardoso & António Jorge Oliveira (Kerigma, PT); Ali Rashidi, Yevgeniya Averhed & Björn Engsten (FU Uppsala, SE)

Guests: Dr. Bernd Floßmann & Ms. Yasemin Kural (German Chamber of Commerce & Industry, DE); Ewa Bacia (IBE, PL) & Katarzyna Dwórzniak (Warsaw Chamber of Commerce, PL); Sérgio Ramos & Gualter Morgado (AE Paredes); Magnus Åkerman, (Chamber of Commerce, SE); José Leitão (Kerigma, PT)

Apologies : Iwona von Polentz (GEB,DE) Salvador Teixeira (Chamber of Commerce, PT)

Day 1

1. Welcome and Introductions

António Jorge Oliveira (Kerigma, PT) welcomed the group to the meeting in Porto, Portugal.

Graham Smith, University of Strathclyde, Scotland, UK opened the meeting and also welcomed the project partners. He thanked António for hosting the meeting in Porto. He also welcomed in particular the attending guests to the meeting and hoped that they would find it an interesting experience.

The meeting moved to the agenda for **Day 1** which included:

- Lead partner welcome, intro and project overview (Graham Smith)
- Guest presentations from:
 - Magnus Åkerman – Sweden
 - Bernd Floßmann / Yasemin Kural – Germany
 - Gualter Morgado (AE Paredes – Portugal)
 - Katarzyna Dwórzniak – Poland

- WP4: Questionnaire progress (Ali Rashidi / Björn Engsten)
- WP5: Age Management seminars (George Stefas)
- WP2: Learning model update + marketing, recruitment & piloting strategy (Alexandra Cardoso)
- WP3: EQF Mapping System & NQFs (Graham Smith / Ewa Bacia)
- Close and summary (Graham Smith)

2. Lead Partner Update

The lead partner update was led by Graham Smith. He welcomed all attendees and hoped that they would find the meeting productive. He went on to inform the guests of project background, its progress and plans including the following points:

- **Finalise WP2** and agree strategy for piloting- Graham outlined the issues experienced by older people such as lack of self-confidence and motivation for learning and also the benefits of reflective opportunities to encourage learning and in addition, the place of the AMaP learning model as a motivational prompt.
- Refine **questionnaire for employers (WP4)**- Graham spoke about employer attitudes via a myths and solutions approach.
- Update **on EQF Mapping System**. Graham described how VET can be of value to older workers and went on to talk about the development of the EQF mapping system
- **2nd Bi-Annual Newsletter**- Graham reminded partners of the requirements necessary for the newsletter.
- **Final Conference**-Graham reiterated the importance of attracting key stakeholders to attend and getting the audience right.
- **Video** of employers and project staff-Graham gave an update of the progress of this item.
- **Interim Report**- Graham stated that the interim report should illustrate an effective and productive partner engagement.

Graham moved on to speak about the **key deliverables** of the project. This was accompanied by a timeline and review of action points accrued from the second partner meeting in Athens. This item opened up a full discussion on the following points listed below.

- Learning Model for older workers
- Mapping System to help facilitate skill mapping against EQF
- Evaluation report of questionnaire to employers
- Development of an Age Management seminar for employers to share results of research and encourage better age management practices
- Development of a 'Talking Heads' DVD with the views of key stakeholders on an ageing workforce and VET for older workers
- Bi-annual Newsletter

- Project website
- Final Conference
- Journal submission to Journal of Vocational Education & Training

3. Guest Presentations

Representatives from the Chamber of Commerce were invited to give presentations as follows:

Magnus Akerman, from the Stockholm Chamber of Commerce, Sweden led the first presentation entitled 'Swedish labour market and age: Swedish legislation and perceived age attitudes in the Swedish labour market.' Magnus stated that most developed countries face increasing shares of the population in retirement rather than productive work. In 1999, only 4 of 10 men and one of four women in the workforce were at the age of 64 in Sweden. He outlined the following points that:

- Large groups in the mid-aged and older labour force have low or obsolete formal education
- Education of older workers is a viable approach to increase the tax base and total life time earnings in order to counteract the effects of an aging population.
- Policies which stimulate retraining of older workers have advocated by national governments and also such bodies such as the OECD and the European Union

In terms of older people in Swedish labour market the employment rate for ages 55-65, in Sweden is better the EU in general. The employment rate for 55-65 in Sweden is 65 % and in EU it is 38%. In 2001 EU aimed to rise the employment rate to 50 % by 2010. He outlined the problems in terms of:

- Attitudes
- Demographic gap
- Political focus on youth unemployment
- Rapid technology shift
- Market moving faster (creative destruction, Schumpeter)
- Labour cost (including insurance, pension schemes etc)
- No cost-benefit analysis - experience v enthusiasm
- Rigid labour market
- Unemployment insurance system => livelihood
- Retraining poorly developed
- Too much Government interference in the market

Gualter Morgado, from AE Paredes, Portugal led the second presentation entitled 'On course to the FUTURE'. Gualter said that the aims of the organisation were to represent, promote and dignify the local and regional businesses with high standards of professionalism. He outlined the enterprise promotion being managed via:

- Consulting
- Business Plans and Market Studies

- Business diagnostics
- Support for internationalisation
- Elaboration of EC projects
- Disclosure of incentive systems to entrepreneurship
- Preparation of applications for EC projects
- Search for specific information to each company and industry
- Support for participation in Fairs
- Actions on boosting trade promotion
- Training at firms
- Marketing and Design events

Gualter went on to list the training opportunities available and outline the local business objectives which included:

- Activity development
- Modernization of management
- Promotion
- New image and corporate identity
- New attitude in the market

Bernd Floßmann and **Yasemin Kural** from Germany provided a didactic methods perspective (analysis and synthesis) on how to work with older people. The Skinner motivational model illustrating the marketing potential of older people was discussed. Messages such as:

‘You’re here. I see you’; ‘You are valuable’ and ‘You are special and unique’ were explored along with initial thoughts on the existing unspoken questions.

Katarzyna Dworzniak, presented the meeting with the perspective from the Polish chamber of Commerce. Report to follow.

4. WP4 Questionnaire progress (Ali Rashidi / Björn Engsten)

The progress of the AMaP questionnaire was presented. Questions from the meeting were invited to agree the main content which is important. The grouping of questions, the addition of specific questions and definition of sections was raised. Ali Rashidi reiterated that the questionnaire was a practical study and consideration had to be given to the number of questions and the time companies would commit to completing the questionnaire. Other points covered were working with Chambers of Commerce to choose a spread of companies and also to have as many companies as possible (100 per country was mentioned) to complete the questionnaire. Also raised were points about choosing companies that know about the AMaP project, providing a follow-up with the results, country comparisons, and how companies will benefit from the AMaP seminar. In addition, the point that the questionnaire need not be identical for each country but basically similar, was made.

Action Point 1- AMaP Questionnaire

Graham Smith and Ali Rashidi will collaborate to produce a final English version of the AMaP questionnaire to be sent to partners.



Lifelong Learning Programme



NOTE: Agenda change - WP3 EQF Mapping System & NQFs was moved to item 1 on the agenda of the second day.

5. WP5 Age Management Seminars (George Stefan)

George presented the overview of the 3 seminars for employers to be delivered in UK, SE & EL. He spoke to the following points:

Overview, aims and Objectives:

- Focus: Inquire on the Scope and Impact of the seminars, the Value of Age Management Practices and Policies, which Policies (Best Practices or National ones?), which Policies (SE & UK have specific policies, while EL & PL do not – National or European)
- The Strategic Challenges of an Ageing Workforce other in SE, other in EL | where to focus?
- Recruitment and Retention Strategies, Informative on best cases or Motivating on strategies that can be applied in each involved Country?
- Age Auditing, informative about the process (pros, benefits & indicative process presentation), practical with resources to self-assess the ageing workforce (methodology, tools on how to), the value of introducing lifelong guidance practices

Additional Objective: To provide feedback on the AMaP questionnaire as this needs to be completed earlier than March 2013. This was discussed as it is required for the development of the seminar content. Ali Rashidi stated that the results of the questionnaire should be available from the middle to end of February 2013.

Ali Rashidi stated that by November the AMaP questionnaire will be on 'Netigate' (questionnaire software). Ali said that while it is non-active there is no cost but when on-line there are associated charges involved. Ali asked that partners wait until they are in a position to make the questionnaire active and then contact him to do this.

Action Point 2- *Netigate* Software, AMaP Questionnaire

When ready, partners must contact Ali Rashidi to make the AMaP questionnaire active on *Netigate*.

Development of Seminar Content: Seminar outline, programme, informative content, evaluation form. Graham Smith stated that the seminar should provide a business case for age-management practices and disseminate the questionnaire findings to employers. Graham Smith raised the option deliver seminars in Portugal, Poland and Germany when the questionnaire results are available.

Seminar Evaluation Form: Acquiring the reactions and feedback about the value of the seminar. The intention is to issue a questionnaire to all participants prior to attendance at the seminar and then issue one after attendance at the seminar.

Marketing Material: This has to be completed by March 2013. The content has to be developed by UoS, FU and 3LRI and then designed by UoS. Tasks to be delegated are flyers, brochures and press adverts.

Recruitment of Employers: This scheduled between April and May 2013 for two months. Each partner involved is to facilitate its existing network database, local employer network, Chamber of Commerce and distribute marketing materials. The output should consist of 15 participating employers /PP involved and 3 seminars in total in EL, UK and SE.

Paulina Wójcik raised the forthcoming Senior Policy in Poland initiated by the Ministry of Labour and Social Policy and the Law and Pension Reform 2012. Graham Smith replied that this was an ideal opportunity to promote AMaP and bring the topic to the top of the discussion, publicise it and influence actions to increase labour force participation of people aged 50+.

Analysis and Evaluation: This is scheduled between June and July 2013 for two months.

- Management

- “Prior Questionnaire” & “Evaluation Form” | 3LRI
- Draft “Table of Contents” | 3LRI -> feedback by FU and PPs
- Delegation of sections | 3LRI & FU
- Evaluation of the feedback received | 3LRI & FU
- Overall evaluation of the WP | 3LRI
- Finalisation of the “Evaluation Report” | 3LRI

- Output

- “Evaluation Report”
- 50 printed pages / PP (each PP to translate and print the report)
- 1 part evaluation of the 3 seminars
- 1 part evaluation of WP.5
- 1 part conclusion, key findings, suggestions
- Electronic version / AMaP website

External partners: George encouraged discussion of the following points regarding external partners:

- How else to valorise?
- Local Employer Networks?
- Chambers of Commerce?
- Organisation’s Network (client & affiliate database)?

6. WP2 AMaP Learning Model (Alexandra Cardoso)

Alexandra led the meeting through the delivery dates for the AMaP learning model.

- Learning Model, Delivery Date June 2012
- Marketing Materials, Delivery date: June 2012

- Recruitment of Participants, Delivery date: August 2012
- Piloting Training Programme, Delivery date: February 2013
- Analysis and Evaluation of Pilot Training Programme, Delivery date: April 2013

She directed the meeting through an overview of the 6-week learning programme, the Trainer's Guide, Evaluation, Marketing and Recruitment.

She stated that trainers/tutors with experience in adult education and in Recognition of Prior Learning (RPL) would have the skills to deliver the learning programme. The learning programme could be carried out in the workplace if the group belonged to that company.

Closing remarks and summary of Day 1, Graham Smith (UoS)

Graham thanked partners and guests for their attention and participation in the proceedings of Day 1 and then moved on to introduce Brian McKechnie (Knowledge Exchange Manager), UoS, to the meeting.

The meeting moved to the agenda for **Day 2** which included:

- WP3 EQF Mapping System & NQFs
- WP6 Update – Dissemination and Valorisation
 - Dissemination and Strategic Development Update (All Partners)
 - Final conference (Iwona von Polentz, GEB / Graham Smith, UoS)
 - Bi-annual Newsletter (Dorota Kowalska, Paulina Wojcik, Semper Avanti)
 - 'Talking Heads' DVD (Graham Smith, UoS)
 - Project Website (Alexandra Cordoso, Kerigma)
- WP7 Update
 - Quality Assurance, external evaluation, Graham Smith (UoS)
- WP1 – Interim Report , Strategic Partnership Only
- Study Visit / Networking, Guests
- WP1 – Financial monitoring: Individual partner meetings, Strategic Partnership Only
- Next partnership meeting in Poland, Dorota Kowalska / Paulina Wojcik, (Semper Avanti)
- AOB

7. WP3 EQF Mapping System & NQFs (Graham Smith & Ewa Bacia)

Lead, UoS (UK) Support, FU Uppsala (SE): To explore benchmarking of older workers experience against EQF and development and test of mapping system.

Ewa Bacia (IBE, PL) talked to a presentation surrounding the work of IBE a research centre, supervised by the Minister of National Education, with almost 100 years of tradition, and involved in:

- Interdisciplinary research on the education system in Poland
- Polish and international research projects, reports and expert opinions, advisory functions in the area of educational research

Area 2 activities of IBE include relations between the education system and the labour market, particularly monitoring the situation of young people entering the labour market; lifelong learning; Economic factors in education, financing education and other widely understood economic issues in education; Legal-institutional aspects of education policy.

Of interest, was the NQF work of IBE, Warsaw, Poland, a project co-financed by the European Union within the framework of the European Social Fund as part of the 'Human Capital' Operational Programme including the development of technical and institutional guidelines for the implementation of the National Qualifications Framework and the National Qualifications Register for lifelong learning (NQF): July 2010 – December 2013.

The NQF project aims:

- To develop a model for the National Qualifications Framework
- To develop a system for recognising competences gained outside the formal education system
- To establish an institution responsible for the national qualifications system, particularly for maintaining the national qualifications register

Graham Smith continued the presentation of WP3 and spoke about the draft mapping EQF system being developed in association with the SCQF, one of Europe's leading organisations in the development of qualification frameworks and in driving the RPL agenda in Scotland. The mapping system should be ready for January 2013. He stated that WP2 provides the foundation for this and there should be linkages for each country. Furthermore, session 6 of the learning model should provide an opportunity to test the mapping system. He went on to say that RPL will be the starting point to raise skills levels. This could lead to accreditation but it should be noted that validation is not within the scope of the project. In addition, CEDAFOP will be interested in the learning model and the mapping system.

Graham concluded this item by reviewing the following points:

- **Issues surrounding this topic**

- Many older adults are unaware of European Qualifications Framework (EQF) or National Qualification Frameworks (NQFs)
- Policy development in most countries on NQFs/EQF is framed around younger people

- **Solutions surrounding this topic**

- To help older adults understand where their skills sit on the EQF framework
- In partnership with NQFs, influence policy development to ensure a more inclusive approach

At this juncture, **Ali Rashidi** gave an interesting presentation entitled, 'Job Skills as a moving target' for VET providers and programmes (JS Toolbox).

The presentation covered the following:

- Context, approach and workshop introduction
- 3 workshops in 3 different sectors
- Beauty care
- Installation technology
- Builders' merchants (wholesale trade)
- 2 tools for transparency
- Sector map (jobs context)
- 'Skillsmanager' (job content)

Ali illustrated that, in terms of job descriptions, content changes and new sectors and jobs emerge, with each job being codified. To draw up a job description there has to be a common language between employers. This JS model is an efficient way to keep people in the labour market and update their skills. Competence mapping is involved and training courses to address skills gaps are designed. Skills maps are created for companies and for individuals. He went on to say that inside quality frameworks there should be mechanisms for innovation.

8. WP6 Update – Dissemination and Valorisation

8.1 Dissemination and Strategic Development Update (All Partners)

Each partner provided a brief update report on dissemination activities and valorisation.

George Stefanos (LLLRI, EL)

George reported on issuing AMaP letters about the Porto meeting to the Chamber of Commerce, Athens and SMEs. There is a KEN forum in September and the vice-principal of KEN will be invited to the final AMaP conference. Dissemination, regarding the ageing workforce, has also taken place as part of active ageing focus.

Gunther Ring (GEB, DE)

Gunther reported that dissemination had taken place using 250 networks which the promotion of active ageing for older people. AMaP has been disseminated via the website. There has also been involvement with the Chamber of Commerce.

Paulina Wójcik (Semper Avanti, PL)

Paulina spoke about a new topic (people aged 50+) for a project which has to be resubmitted next year to the Marshall Office. In terms of dissemination, she reported that the Regional Chamber of Commerce has been less helpful than the National Chamber of Commerce. She spoke again about the Senior Policy which will help with learner workshops. She continued by saying that it was planned to involve the Ministry of Labour and Education in the final AMaP conference. The AMaP newsletter had triggered interest from organisations working with older people.

Alexandra Cardoso (Kerigma, PT)

Alexandra introduced MOODLE as a learning platform to recruit for the workshops and present the AMaP project. It is linked to the Portuguese 'new opportunities' programme.

Ali Rashidi (FU Uppsala, SE)

Ali reported that the AMaP newsletter has been sent by email to the Chamber of Commerce, the National VE Education and the Re-training Agency of older people to get them engaged with the project.

They are a major player in Higher and VET.

Graham Smith (UoS,UK)

- Invited to present project at the LINQ – Learning Innovations and Quality conference on 23 October 2012 in Brussels – Susanna representing partnership
- Invited to present project at European Commission conference on Active Ageing and Intergenerational Learning on 19-21 November 2012
- Meetings with Scottish Government ‘Think Tank’ – Scotland’s Futures Forum to discuss DVD
- Extensive engagement with Scottish Credit and Qualifications Framework
- Met with Athens Chamber of Small & Medium Industries – President invited to be interviewed as part of the DVD
- Project flyer displayed at Knowledge Exchange (Age Diversity in Employment) event in Strathclyde for employers, in partnership with Glasgow Chamber of Commerce – will help with WP5
- Invited to present project at Edinburgh Napier University Employment Research Institute

Graham reported on the JVET conference and the development of an abstract (AMaP – older people) re access to VET for minority groups.

8.2 Final AMaP conference (Gunther Ring, GEB / Graham Smith, UoS)

Location – Berlin, 17 & 18 October 2013

Items discussed included: venue, accommodation, guests, target audience, translation, keynote speakers and format.

Graham Smith opened this item. He stated that the conference was not only to showcase AMaP but also other projects with a focus on age management and these should be about VET, Employability and Lifelong Learning.

Ali Rashidi said that he agreed but at what level. Should it be one day high level policy event and one day of workshops?

Brian McKechnie enquired about the scale of the conference (200+?) and the capacity of the venue and that the International Federation on Ageing (IFA) might welcome a stand. Brian proposed putting out a call for speakers in the next AMaP newsletter. He went on to say that numbers suggested that each partner would bring 10 delegates (60 in total). He also stated that the conference should present the products of AMaP.

A discussion ensued on bringing delegates, quotas for each partner as set by budget, costs and budget issues were clarified. It was reiterated that the conference is free.

Gunther Ring indicated that the proposed venue in Berlin may only be booked 6 months in advance.

Action Point 3 – AMaP Final conference

Partner GEB, Germany to provide all relevant information regarding the conference including venue, costs for accommodation etc.

8.3 Bi-annual Newsletter (Dorota Kowalska, Paulina Wojcik, Semper Avanti)

Lead, Semper Avanti (PL) Support, UoS (UK) 1st Newsletter completed and translated by SE colleagues. Awaiting DE, EL, PL & PT versions (Also PT Launch Flyer)

2nd Newsletter due Nov 2012. Ideas for a theme were discussed-Could this be framed around Work Package progress? Should we start to talk about the final conference if we manage to secure a venue in next few weeks?

Dorota reminded the partners that the second AMaP newsletter has to be ready for November 2012.

Action Point 4 – AMaP Newsletter 2

All partners asked to provide Dorota Kowalska with newsletter items by 15 November 2012.

8.4 ‘Talking Heads’ DVD, (Graham Smith, UoS)

Graham Smith reminded the meeting about the purpose and objective of the DVD. That the question framework design is employer oriented. This will include their views on older workers and VET/CVET and older workers. Employers are to be identified. Graham Smith reported that the work on the DVD would continue in Poland.

8.5 Project Website (Alexandra Cordoso, Kerigma)

Alexandra reported that Susana would be pleased to receive any website updates and partners should forward these to her at any time.

9. WP7 Update – Quality Assurance, external evaluation,(Graham Smith,UoS)

Graham provided the meeting with a summary update of this item.

- Outlines the quality aspects of the project
- Requires signature by all partners
Includes:
 - Agreement to send required documentation and reports to lead partner, with monitoring by lead partner
 - Agreement on communication
 - Agreement on quality monitoring – principles of ‘duality’
 - Requirements for evaluation (internal & external)

Quality Assurance – External evaluation

- Purpose: *“focus on communication between partners, ownership of work packages, financial management of the project, dissemination and valorisation activity and quality of products.”*

- To be carried out by TAEN – The Age and Employment Network, probably in Germany or Poland
- Will involve face-to-face meetings with all project partners
- Will cover a range of quality assurance topics from throughout the project period e.g. communication, project management, project monitoring, achievement of deliverables etc.
- Final evaluation report will be completed after the final conference and will accompany final report

10. WP1 Interim Report and Financial Monitoring (Strategic Partnership Only)

Graham Smith led this item. He said that the report was in two parts a **Public Part**- marketing, PR ways to present work publicly. Graham said he would write the executive summary. Page 14 of the Guidelines provided further information. For the second and **Confidential Part** – Graham gave some precise information to the partners. For the **Financial Part** – Graham suggested that partners check the handbook. Provide any staff costs with guests charged from other costs.

Regarding the conversation with Gunther Ring (GEB, Germany), Graham stated that he would email the Commission to clarify the situation in terms of National rates and Commission rates.

Main Points for the **Interim Report** included:

- Due at the Executive Agency by 31st December 2012
- Reality is that report will have to be sent by courier on Thursday 20th December 2012
- All paperwork* required from partners by Friday 7th December 2012

* Evidence of:

- Financial information
- Activity reports
- Progress toward deliverables
- Marketing and promotion
- Dissemination and exploitation activity

November 2012 – consolidation of project spends and progress for Interim Report due December 2012

Project must have demonstrated spend >70% of initial 40% pre-financing to trigger further grant payment.

11. Future partnership meetings were raised and the following dates agreed:

Meeting in Wroclaw, Poland 21st and 22nd March 2013

Final Conference in Berlin, Germany 17th and 18th October 2013

The meeting was reminded to book flights early as this was more cost effective and to retain boarding passes. They should think about the best way to get to the next meeting, booking accommodation, the theme of meeting and inviting guests.

12. Conclusion of meeting

Graham Smith thanked the entire meeting for their participation. He thanked the hosts for their organisation and hospitality. He then advised that he would be available to meet individually with partners if they required clarification on any matters of concern.

Action Point 1-AMaP Questionnaire

Graham Smith and Ali Rashidi will collaborate to produce a final English version of the AMaP questionnaire to be sent out to partners.

Action Point 2 - *Netigate* Software, AMaP Questionnaire

When ready, partners must contact Ali Rashidi to make the AMaP questionnaire active on *Netigate*.

Action Point 3-AMaP Final conference

Partner GEB, Germany to provide all relevant information regarding the conference including venue, costs for accommodation etc.

Action Point 4-AMaP Newsletter 2

All partners asked to provide Dorota Kowalska with newsletter items by 15 November 2012.