

# Intergenerational Approach Handbook



Crossing Generations, Crossing Mountains



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## 1. Scope & Content

The Big Foot project aimed at tackling common challenges of the rural mountainous regions, including the lack of economic opportunities and out-migration of the younger population, by applying a participatory intergenerational learning approach. The project demonstrated the value of enabling and valuing the skills and knowledge of both the older and the younger generations in order to enable innovative, creative and productive solutions for local sustainable development.

Based on current intergenerational programmes, initiatives and practices the Intergenerational Approach Handbook has been developed as a facilitator guide for communities, organisations and individuals by providing a framework to plan how activities can be developed to address their particular interests and to be a gateway to a range of resources to support and inform this planning. The Handbook can be also used as a reference document for people already engaged in programmes by presenting procedures for assessing and evaluating those activities.

The Intergenerational Approach Handbook is set out as follows:

- Following this introduction, Section 2 provides a short introduction to Intergenerational Learning;
- Section 3 sets out the overall overview and purpose of the Intergenerational Approach Handbook;
- Section 4 provides a generic Process Model for Intergenerational Activities related to project management elements;
- Section 5 contains a concrete Intergenerational Planning Model grounded in theory and practice, including operational templates for practical work;
- Section 6 describes Do's and Don'ts in Intergenerational Practice in order to give hands-on guidelines how to make Intergenerational Activities work;
- Section 7 demonstrates procedures for assessing, evaluating and validating Intergenerational Activities using the Big Foot experiments, including templates for summarising the results of those experiments;
- Annex I lists the used sources and suggests further readings;
- Annex II contains a Screening Questionnaire for Intergenerational Experiments;
- Annex III finally provides the templates for i) a Project Failure Prevention Analysis and ii) for an Issues Plan.



## 2. A Short Introduction to Intergenerational Learning

The concepts of intergenerational learning, social capital and inclusion are strongly interrelated as both make reference to i) actual and potential resources of social networks for the individual, ii) formally and informally shared norms and values between members of social networks, iii) reciprocity and trust within these networks and between the individual and the network. As a consequence intergenerational learning was over centuries and still is nowadays a prime resource base for individuals, groups and the society at large. Individuals able to access and rely upon these resources and relationships increase their chances for personal and professional development; communities benefit from enlarged mutual exchange, active participation and cooperation; and societies become more cohesive and inclusive. On the other hand social capital is not equally available to all citizens as geographic, individual, social and intergenerational isolation might limit the access to resources. Furthermore social capital is not created equally, but mediated through psycho-social, socio-demographic and socio-economic variables.

The renewed and even increasing interest in intergenerational learning builds upon current developments in individual lives, in society at large and in learning across age groups and generations. The main drivers for intergenerational policy and practice can be summarised as follows:

- Demographic change, longevity, ageing society and workforce;
- Changing economic, insurance and welfare patterns;
- Increasing economic disparities, '2/3 societies';
- Shift from full- to part-time employment; economic need for mobility and flexibility, 'modern nomads';
- Shift from a industrial to a Knowledge Society;
- Individualised/atomised societies, flexible lifestyles and changing biographies, from individuals to 'multiduals';
- Dissolving traditional family structures, single households, social isolation of the elderly etc;
- Urbanisation;
- Globalisation, migration & ethnic diversity

According to the project consortium EAGLE (European Approaches to Intergenerational Lifelong Learning; [www.eagle-project.eu](http://www.eagle-project.eu) ) and the Centre for Intergenerational Practice (CIP) at the Beth Johnson Foundation (BJF; [www.centreforip.org.uk](http://www.centreforip.org.uk)) intergenerational practice and learning can be defined as follows:

*"Intergenerational practice aims to bring people together in purposeful, mutually beneficial activities, which promote greater understanding and respect between generations and may contribute to building more cohesive communities.*

*Intergenerational learning is a process, through which individuals acquire skills and knowledge, but also attitudes and values, from daily experience, from all available resources and from all influences in their own 'life worlds'."*

In line with this definition the ADD LIFE project (Adding Quality to Life through Inter-Generational Learning via Universities; <http://add-life.uni-graz.at>) states that “inter-generational learning recognises relationships between young and old as mutually important to both age groups and to society in general. Inter-generational learning can be defined as the reciprocal learning relationships and interactions between young and old.”

As a consequence intergenerational learning is according to ADD LIFE composed of the following building blocks:

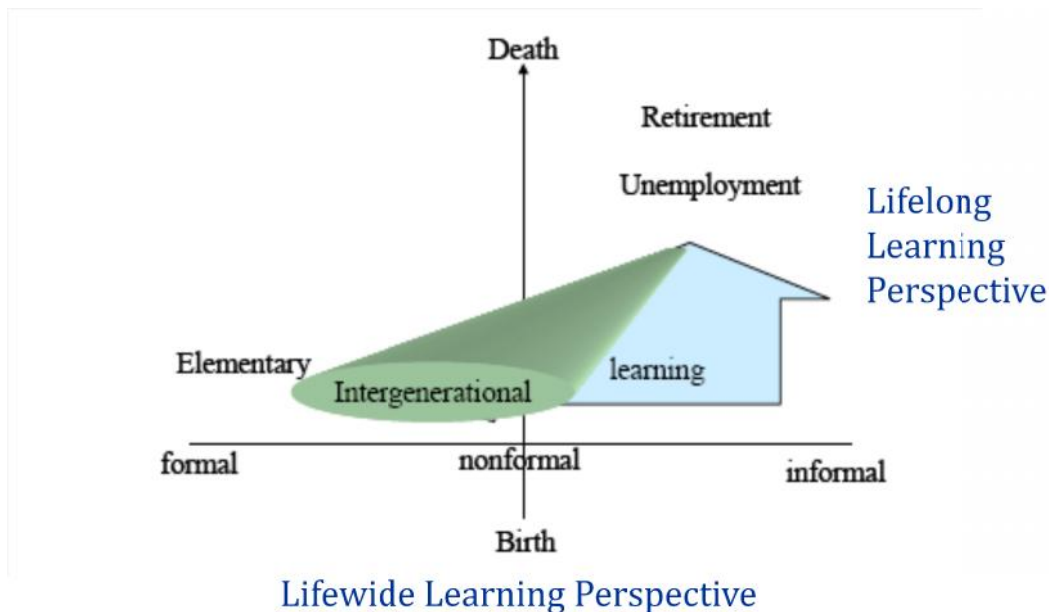
- Related to interdependence and reciprocity;
- Important for pursuing common activities and growing together – in other words, a relationship is more than a mere interaction;
- Explicitly addressed to the different experiences of the different age groups or generations;
- Oriented towards the exchange of experience so that use is made of the skills specific to each generation;
- Designed to foster critical thinking about how stereotypes tend to weaken the ability to perceive that there are individual differences between people and that;
- Generalisations are never completely accurate;
- Aimed at counteracting a negative stereotype of ageing and takes into account the level of competence of the elderly and its relevance in the education of younger people. Inter-generational learning has the task of developing understanding of the attitudes of other age groups and correcting these as required.
- Oriented towards the exchange of experience so that use is made of the skills specific to each generation;
- Designed to foster critical thinking about how stereotypes tend to weaken the ability to perceive that there are individual differences between people and that generalisations are never completely accurate;
- Aimed at counteracting a negative stereotype of ageing and takes into account the level of competence of the elderly and its relevance in the education of younger people. Inter-generational learning has the task of developing understanding of the attitudes of other age groups and correcting these as required.

On the other hand it is also agreed that intergenerational learning does not merely consists of generations being together – being together is not enough, on the contrary purposeful activities are the crucial denominating factor. Furthermore not every learning process which involves both young and old can be necessarily regarded to be a case of intergenerational learning [on the other hand 80% of all learning is estimated informal or un-intentional.

Finally intergenerational learning is not only involving the transfer of knowledge, but at the same time the exchange of attitudes and values from both generations.



According to Boström (2003) a possible map of intergenerational learning within a life-wide and life-long learning context may therefore look as follows:



**Figure 1:** A Possible Map of Intergenerational Learning

The MATES project (Mainstreaming Intergenerational Solidarity; [www.matesproject.eu](http://www.matesproject.eu)) finally describes a set eight core principles that practitioners and policy makers should take into account when adopting intergenerational approaches:

- Mutual and Reciprocal Benefits;
- Participatory;
- Asset Based;
- Well Planned;
- Culturally Grounded;
- Strengthens community bonds and promotes active citizenship;
- Challenges Ageism;
- Cross-disciplinary.

In the recent bulk of literature it is widely agreed that intergenerational learning – when carefully planned, implemented and executed – offers a number of benefits to society, individuals and communities. These include:

- Uniting segregated generations and building better understanding between generations;
- Encouraging active citizenship and social participation;
- Encouraging cross-generational working;
- Sharing societal and professional resources, tacit and explicit knowledge among generations;
- Challenging social problems cross-generationally;
- Addressing different social & e-Inclusion objectives and competence areas simultaneously;

- Supporting Lifelong and Life-wide Learning;
- Maintaining & building human and social capital simultaneously.

In turn the pitfalls and challenges of intergenerational work are equally well known from the in-depth analysis of case studies and initiatives. Barriers towards exchange and learning between different generations are commonly denoted as follows:

- The trap of 'Homogeneous Groups' (Intra i.e. within one age group & Inter i.e. between age groups);
- The trap of different 'Life Worlds', 'Identities' and 'Values' sets and systems;
- The trap of 'Mono-directional Life Courses';
- The trap of different 'Pedagogies' (e.g. traditional transmissive vs facilitated collaborative);
- The trap of 'Technologies' (e.g. digital skills and competences);
- The trap of 'One-size-fits-all' solution (e.g. intergenerational learning is always embedded in a wider societal context);
- The trap of 'Information Processing' (i.e. in terms of depth and width, in assimilation and accommodation as well as in the equilibrium);
- The trap of 'inter-personal', 'inter-/intra-group' and 'inter-generational' problems;
- The trap of 'Sectoral Silos';
- The trap of 'sustainability' of projects and initiatives (either bottom-up or top-down);
- The role of 'champions' on the ground and 'advocates' on the top;
- The trap of 'Standardised Methodologies' and 'Linear Transferability';
- The trade-off between intergenerational exchange and child welfare/protection acts;
- The trade-off public sector and third/voluntary sector;
- The contradiction between 'preservation' and 'transformation';
- The trap of 'romancing the past' and 'innovation'.

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Notes:



### 3. Overview & Purpose

The purpose of this document is to provide a framework primarily for practitioners, but which may also be of some interest to policy makers and educators, to develop and/or implement intergenerational programmes based on a framework that is founded in analysed good practice. The Handbook has been written to help people to think about why intergenerational activities are relevant to them. To provide a framework to plan how activities can be developed to address their particular interests and to be a gateway to a range of resources to support and inform this planning. It can be also used as a reference document for people already engaged in programmes.

This framework is drawn from previous Research & Development (R&D) projects and initiatives on local, regional, national, European and international level (independently whether initiated top-down or originating bottom-up) and brings together a number of aspects of the programme to provide a set of tools and approaches to help people to develop their ideas and practice.

The difficulty of capturing such a complex subject as intergenerational work, practice and/or learning in a single document is recognised and accepted. The reader will therefore find a list of recommended reading for people who wish to find out more about different aspects of intergenerational work in the bibliography.

There is certainly also a cultural context to the different settings intergenerational work is operating in (in the case of Big Foot in Greece, Italy and Bulgaria) and which will shape how things are developed.

The Handbook has been designed to enable people to dip in to the various sections according to their particular needs or if there is a particular issue they wish to focus on. The process model can be entered in whichever section is most relevant to you at that moment in time.

Big Foot at the same time sees intergenerational learning as being shaped by the identified needs and local circumstances that people are working in. The Screening Questionnaire for Intergenerational Experiments provides a framework to consider: i) who your collaborators are, ii) why you are developing a programme and iii) what you intend to achieve.

In many ways successful intergenerational learning projects are grounded in models of participation and engagement. Through involving potential collaborators at the beginning the finally chosen activity (in the case of Big Foot through the Participatory Mapping; <http://www.bigfoot-project.eu/publications.html> ) is most likely to reflect what people are really seeking to change rather than the preconceptions of a small group or of an individual.

Inevitably effective models of participation between learners will enable them to take control and shape the learning and this will be particularly important in informal settings where the planning should provide the structure and opportunities for learners to achieve their own outcomes.

Intergenerational learning programmes reflect the core principles of all well planned projects and it is not the intention of this document to describe in detail accepted good practice in project planning.

Instead the Handbook is seeking to encourage people to think about intergenerational learning from the viewpoint of social inclusion and the mutual benefits of bringing the young and old together.

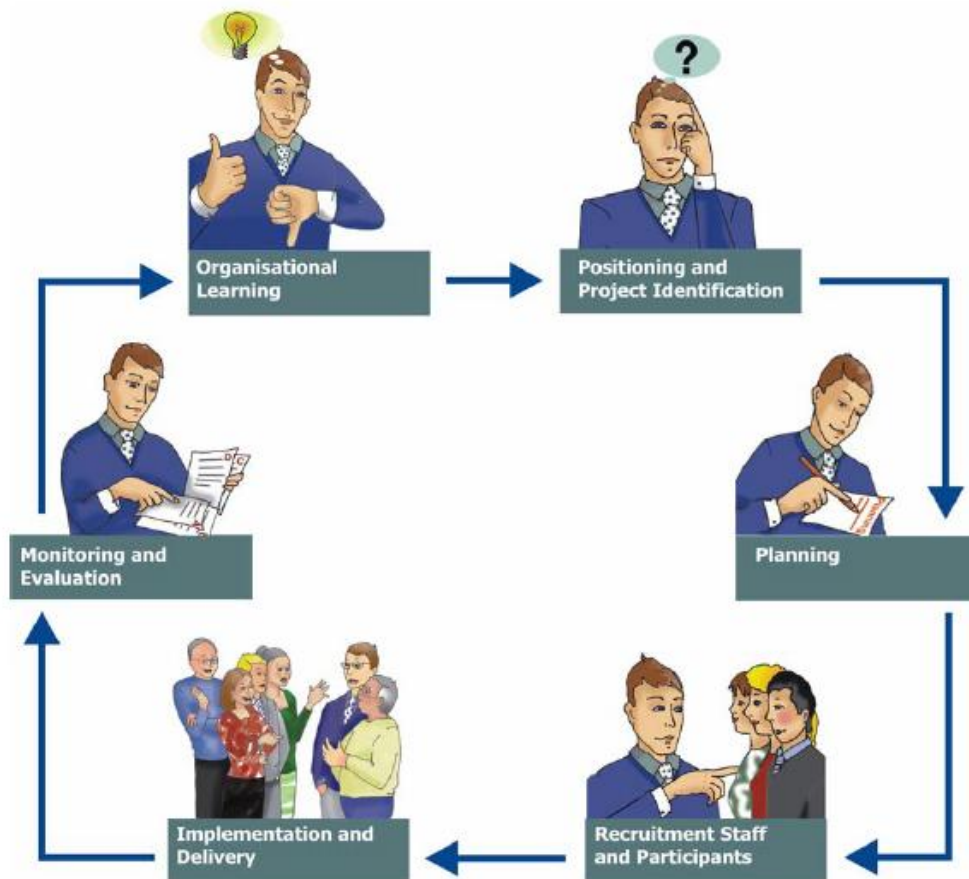
Once you have identified what you and your collaborators are seeking to achieve it is necessary to consider the most effective way to undertake this. In some cases the shared aims of your local partners will present the most likely solutions to you.

In other cases you may need to undertake research to look at different models and types of intergenerational practice to help you develop your ideas. The following typology below may be helpful in framing these considerations:

- Community development, living & safety incl. intergenerational living and meeting places;
- Education, training & learning incl. general education and training, Lifelong Learning, language learning, literacy, numeracy, digital literacy, senior universities, knowledge exchange, hobbies;
- Mentoring i.e. intergenerational support, services and consultancy;
- Mediation incl. problem/conflict solving, prevention of violent behaviour
- Media education incl. Information and Communication Technologies (ICTs);
- Social inclusion/participation, active citizenship;
- Employability;
- History and reminiscence incl. oral history, preserving cultural heritage, work with contemporary witnesses;
- Health;
- Arts incl. culture, theatre, play, music;
- Environment & environmental protection;
- Grandparents and grandchildren and older kin;
- Travel, excursions & leisure time.

#### 4. A Process Model for Intergenerational Activities

The following process model of EAGLE<sup>1</sup> is proposed as a planning mechanism for both people planning new projects and those seeking to reflect on and improve existing work. This model is perceived as a dynamic one where people may enter it at different points depending on their current level of project activity. We have used information from different available sources to illustrate the various stages.



**Figure 2:** The Process Model of the EAGLE Toolkit for Intergenerational Activities

The introduction of the RCT Tool-kit for Intergenerational School Projects notes accordingly:

“Whilst the Tool-kit offers a very structured approach, it should also be viewed as a flexible and versatile guide that can be used as seen fit by the user. Every Project is unique, as are the individuals involved in them, and the approach offered by the Tool-kit should be adapted to help you deliver upon the aims of your Project.

As such, please feel free to use, amend or ignore the templates as appropriate to your Project. However, it is strongly recommended that you try using each of the templates provided so you can understand for yourself the value that they may or may not bring.”

<sup>1</sup> The original contribution was drafted by Alan Hatton-Yeo, Beth Johnson Foundation (BJF), United Kingdom.

## 4.1 Positioning & Project Identification



The Screening Questionnaire is designed to assist you with this stage. In addition to being used to plan new work it can be used for existing projects to revisit and clarify their expectations, aims and objectives for their current programme.

In this stage you need to think about why you are running, or intending to run your project or programme, how you know it is needed and what do you intend to be different or changed because of the work you are undertaking.

There will be a reason or reasons why you have decided to run your project or programme of work and in some cases you may not have started out to do intergenerational work. One project started out to try and do something about the large number of isolated older people on a local estate. It was only when they began to talk to other people in the area that they discovered both the local school and the local youth organisation were keen to develop new volunteering opportunities and were concerned that many older people seemed to be so negative about young people.

When they considered this in more detail they came up with the following set of aims:

- To reduce the isolation of local older people;
- To develop volunteering opportunities for young people;
- To increase the amount of positive contact between local younger and older people.

Once they knew what they wanted to achieve planning became much easier. This is an example of how talking and listening to people and potential partners in the area contributed to shaping the project.

In shaping your plans it is helpful if you and your partners and participants reflect on the following questions:

- You have developed or are developing an intergenerational project. What makes it intergenerational and what does this mean to you?
- Think about your own personal belief system and what it is that makes intergenerational approaches or work important to you?



- Do you, or did you, involve the young and old in planning? Are they given a proper voice in shaping the project?
- Does your project really try to break down the barriers between the two generations?

Big Foot understands that for some projects they evolve and become intergenerational organically because that is the most appropriate way to meet the project's aims. If this happens you will have undertaken a journey in your own thinking and your reflections on this are part of your own learning.

What cannot be overstressed is that intergenerational work is based on true reciprocity between the generations. It is essential to see intergenerational work as linking across all of the generations, placing equal value on all of their contributions and breaking down the age segmented structures that shape so much of our thinking and planning.

Intergenerational projects can take many forms. Some examples, but by no means exclusively, are:

- Older and younger people coming together to share learning experiences and gain a better insight about each other;
- Older volunteers mentoring pupils in school;
- Skills and competence sharing;
- Young volunteers providing services and support to older people – helping them go to the shops, reading to them, visiting, running errands;
- Older volunteers supporting young parents;
- Toddlers visiting people with dementia in residential settings;
- Older people working with pupils on a project to promote cultural exchange using oral history or the arts;
- People from different generations working together to transform a waste area into a neighbourhood park;
- People of all ages working together to improve their community.

By the end of this stage you should have a clear idea of what you are aiming to achieve, why this is needed and what the various participating groups hope to gain or make different.

## 4.2 Planning



This should link back to your overall aims and vision for the project.

In your original consideration and planning you will have decided on the groups you want to work with. In our example the project wanted to work with isolated older people in the local community. Preliminary work had been undertaken talking to some people to see if they wanted to be involved but the challenge for the project was how to involve people who lacked confidence and were quite disengaged. In this project older people became ambassadors for the programme and went around talking to people in their neighbourhoods and encouraging people to come to the initial meetings. In the same way if you decided you were going to work across different cultures you would have to plan carefully to ensure the project was inclusive and you took the time to really understand the implications of cross-cultural approaches.

At this stage of the project you need to lay down the foundations for your proposed project or you need to revise your plan in the light of experience if it is an existing piece of work. A more detailed planning model is described later in the following Chapter 5.

## 4.3 Recruitment of Partners, Staff & Participants



Contrary to what people sometimes think lack of appropriate structure can be a real barrier to the roll out of a project or initiative. How can you recruit the right people and give them the training they need if you and they don't know what their role involves? Is it clear who is responsible for what and who people can turn to if they need additional support? Thinking the project through and planning what procedures and policies you need from the beginning can be really freeing.

In our example it was important that the different partners, school, youth organisation and older people's organisation knew who was taking responsibility for what. From the very beginning they thought about the things people would be concerned about. What rules should they have for young people visiting to make sure everyone felt safe? Would it be best to start with activities where the young volunteers and older people met in a public setting to do activities together until people were confident they had the right systems to manage home visits? Might there be too many risks to this unless some kind of supervision could be in place? In this case after shared activities the next strand developed was for the young people to help with people's gardens under discreet supervision.

Inevitably intergenerational work involves working with a range of different partners because it cuts across traditional sectorial and professional boundaries. This can make clear partnership roles and agreements particularly important as organisations from different sectors may have different cultures and approaches. One example was of a youth organisation working with an older people's organisation.

The youth organisation assumed all of the older people's organisation volunteers would be police checked as this was their practice and so didn't ask this question. As it turned out this assumption was inaccurate and it became a source of considerable embarrassment when this was discovered later.

In work on mentoring in schools it may be useful to draw up a partnership agreement being clear about what the expectations are of each other can be. This is particularly useful when you have volunteers giving up time to go into school. The school administrative staff have to have a responsibility to contact the volunteer if the pupil is absent or their timetable has been changed. There is nothing more devaluing than coming in to school to discover your mentee isn't there that day. There is an equal responsibility for older people's groups to think about how they behave and approach schools. Time spent in preparation is rarely wasted and often the secret of success. It is essential to organise preparation for all participants involved as mutual understanding and respect is a pre-requisite to a successful activity.

If you are going to work with individuals or groups of people you need to think about how you are going to get them ready to take part as effectively and satisfyingly as possible. If you were going to bring a group of young and old people together you would might want to spend time with them separately first to prepare them for meeting together. As well as obvious things such as listening to each other it might be helpful to talk to people about what they expect of the other group and how they think they might behave towards each other.

It is also important to get people to think about boundaries and how they need to keep themselves safe and not offend anyone else. It is essential that both groups respect the other's views, listening even if they disagree.

## 4.4 Implementation & Management



This is the stage where you translate your plans into activity. The time you spent on planning and engagement will be a major contributor to the success of the actual programme. Do not be afraid of being flexible at this stage as you start the piece of work. Continue to listen to people, respond to their ideas and opinions and make sure from the beginning that everyone feels they have a part in whatever activity or activities are taking place. Intergenerational work is about participation and mutual respect. Doing together and not doing to.

## 4.5 Monitoring & Evaluation



When you developed your project you will have had an idea about the pathway, or stages, you expected the project to follow. Regular monitoring will enable you to see if the project is on track and if not give you the chance to take any necessary steps to address any [problems or arise. Equally there may have been things that happened unexpectedly that may show a better way to do things and these need to be identified and acted upon.

If you are to demonstrate the quality of your programme we need to be able to demonstrate what has changed because of our work. Going back to the outcomes proposed in the original plan for this project think about how you will measure or assess if they have been achieved? How will you go about evaluating or measuring the success of your programmes? Examples of evidence can include:

- Participants feedback sheets;
- Self-Administered Questionnaires (SAQs);
- Monitoring and observation reports;
- Evaluation reports;
- Recorded evidence & (web) statistics;
- Produced materials/objects;
- End of programme report;
- Data/evidence collected.

In some settings and countries it may be possible to develop partnerships with universities and teaching institutions for students to undertake evaluation studies as part of their academic course.

Further information on assessing, evaluating and validating intergenerational activities can be found in Chapter 7 of this Handbook.

## 4.6 Organisational Learning



This is the essential reflection stage of the project cycle. Throughout the process to date you will have been testing ideas and approaches and gaining learning and insight in to what makes your project effective, what may need to be altered and what should be done differently in future. If the project is to continue this is your opportunity to apply that learning to the next stage of its development and so provide a process of continual project improvement.

Take time to stop and think with all of the participants about how things have worked, how you might want to do things differently or what new things you have learnt. Using this information you can then reshape the next stage of the project and alter your planning to make it more effective and more responsive to what you are all trying to achieve together.

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Notes:

## 5. Example of an Intergenerational Planning Model

This model builds on planning models developed by various organisations, amongst them:

- ‘Tool-kit for Intergenerational School Projects’ applied in council of Rhondda Cynon Taf (RCT);
- ‘Certificate in Intergenerational Practice’ by the University of Lampeter;
- ‘Approved Provider Standard Guidance Notes for Organisations Providing Intergenerational Projects or Programmes’ by the Centre for Intergenerational Practice (CIP) and the Beth-Johnson-Foundation (BJF),
- Manchester’s Intergenerational Practice Toolkit ‘Creating Connections, Breaking Down Barriers’;
- ‘A Guide to Intergenerational Practice’ by the Beth-Johnson-Foundation (BJF).

The following Figure gives a first overview of the intergenerational planning model.



**Figure 3:** The Overview of the Process of the RCT Tool-kit for Intergenerational School Projects

## 5.1 Laying the Foundations

### Project Identification

The most important foundation of a project is the views and ideas of potential participants. When you come to think about identifying a project and setting its aims and objectives, this foundation needs to be built in.

This stage is designed for you to identify appropriate local projects or opportunities for your local area and community in broad detail. At the end of this stage you will have:

- Written a proposed project title;
- Identified your aims including in broad terms your proposed project participants;
- Identified your objectives;
- Agreed proposed outcomes;
- Written a supporting commentary.

This is the most important moment, as everything else will be driven from this point, and so each of these stages is designed for you to think these elements through in detail. In many respects a project has to do 'what it says on the label'. If, as one of its aims, a mentoring project is concerned with reducing truancy in a school, then the change in truancy rate will have to be indicated as an outcome (this can eventually be 'measured at the evaluation stage). There will be other aims and outcomes that are not easily measurable but just as important.

This initial project identification stage will drive the whole project; therefore it is worth getting it right as far as possible. It is what gives the project shape and allows you to explain it clearly and concisely to others, for example, partners and potential funders. At this stage, you will also have to begin to think about the scope of the project, is it going to be a large, complex project or will it be a smaller, community based project, run by a group within the community and for the community?

One further key point to bear in mind at this point is: What makes your project purposefully intergenerational?



**LAYING THE FOUNDATIONS**

<b>A) Establish Partnerships</b>	
<ul style="list-style-type: none"> <li>● Establish Partners and achieve buy-in</li> <li>● Establish Project Steering Group</li> </ul>	<p>Think about involving all possible organisations / stakeholders involved in the project e.g. through participatory mapping, start-up public evenings and individual consultations</p>
<ul style="list-style-type: none"> <li>● Agree Roles and Responsibilities</li> </ul>	<ul style="list-style-type: none"> <li>● What are people’s roles during the set-up process?</li> <li>● What will people’s roles be once the project is up and running?</li> <li>● Use Action Plans to delegate tasks and actions</li> </ul>
<ul style="list-style-type: none"> <li>● Establish Communication Network</li> </ul>	<p>Collect contact data of all organisations / stakeholders e.g. name, address, phone, fax, e-mail, Skype etc</p>
<b>B) Create Project Brief</b>	
<ul style="list-style-type: none"> <li>● Create a Project Plan Overview to ensure that all parties are of a consistent understanding of the project from the outset.</li> <li>● Please use the Screening Questionnaire for Intergenerational Experiments to create a Project Plan Overview (see Annex II).</li> </ul> <p><i>At the early stages it may not be possible to complete the Project Plan Overview in full or in depth. However, it can be used to record as much detail as is known and to assist the Project Coordinator / Case Manager in understanding some of the additional details that need to be considered at this stage.</i></p>	<ul style="list-style-type: none"> <li>● The Project Plan Overview should detail:               <ul style="list-style-type: none"> <li>○ Rationale (incl. aims, objectives, activities, pedagogical approach, usage of Web 2.0 technologies, interaction between participants, desired outcomes / impact / achievements);</li> <li>○ Target / collaborating groups;</li> <li>○ Organisational arrangements, times and dates;</li> <li>○ Location;</li> <li>○ Learning activities, fields of learning, categories of learning activities;</li> <li>○ Knowledge / learning exchange;</li> <li>○ Competence development;</li> <li>○ Expected outcomes;</li> <li>○ Evaluation, validation approach and instruments;</li> <li>○ Celebration ceremony and closure arrangements;</li> <li>○ Links to websites and social software;</li> <li>○ Usage of external resources.</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>● Update the Project Plan Overview as details change over time</li> </ul>	<ul style="list-style-type: none"> <li>● Ensure all members of the Project Steering Group are up-to-date with the Project Plan Overview as things change</li> </ul>

**Table 1:** Laying the Foundations for Intergenerational Projects

**LAYING THE FOUNDATIONS (cont.)**

<b>C) Early Paperwork</b>	
<ul style="list-style-type: none"> <li>● Needs Analysis</li> </ul>	<ul style="list-style-type: none"> <li>● Consider the potential needs of:               <ul style="list-style-type: none"> <li>○ Younger People (e.g. school pupils);</li> <li>○ Older people;</li> <li>○ Schools;</li> <li>○ Teachers, trainers, facilitators, mediators;</li> <li>○ Location and context;</li> <li>○ Community;</li> <li>○ Other organisations / institutions;</li> <li>○ Project coordination.</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>● Project Failure Prevention Analysis (see Annex III)</li> </ul>	<ul style="list-style-type: none"> <li>● Assess the likely influences that could cause your project to fail</li> <li>● Plan how to overcome these challenges before they hit</li> </ul>
<ul style="list-style-type: none"> <li>● Action Plans</li> </ul>	<ul style="list-style-type: none"> <li>● Use Action Plans to delegate tasks and actions</li> <li>● Specify who is responsible for each task and specify when tasks should be completed by when to keep project on track</li> <li>● Record general notes, details of progress, reasons for delays</li> </ul>
<ul style="list-style-type: none"> <li>● Project Timescale</li> </ul>	<ul style="list-style-type: none"> <li>● Make a list of key dates and targets (milestones) to maximise the likelihood of your project „going live” on the planned date</li> </ul>

**Table 1:** Laying the Foundations for Intergenerational Projects (cont.)

## 5.2 Project Planning & Research

### Development of Plans: Identifying Participants, Planning Tasks and Activities

The stage is comprised of three parts: identifying participants, then outlining all the tasks and activities that will comprise the project, then finally combining participants with those tasks and activities (i.e. who will be doing what).

This stage is where you develop the finer detail of your project. This means thinking about how you will identify the actual participants (and potentially recruit them into your project) and also begin to list all the tasks and activities that need to be undertaken both during the planning stages and then once the project is implemented.

At this stage it is important for you to consider the second and third core principles of intergenerational practice namely:

- Mutually beneficial, one group is not 'giving to' the other - there are reciprocal benefits;
- Promotion of respect and understanding.

#### *Participants*

Identifying participants should have begun at the project identification stage; the participant population should link back to your aims and objectives. At this stage, you would have considered, in broad-terms, who will take part. Think now specifically where these participants might come from, how they might be recruited into the project.

Participants are all those taking part, including staff volunteers and all other non-paid staff.

Your participants will come from a range of backgrounds and as detailed above, may take on differing roles within the project.

#### *Tasks & Activities*

Tasks and activities are the basic building blocks of any project. A task or activity is an identifiable (and measurable) piece of work covered over a set period of time; this could be hours, days or weeks.

Task and activities can also relate to each other and so have to follow-on one from the other in a logical or sequential order. For example, one task might be to recruit ten volunteers. Another activity might be for volunteers to receive training. Obviously the second task cannot take place, until the first task is completed. Additionally, recruiting volunteers can comprise a number of separate tasks, e.g. drawing up a leaflet about the project; drawing up and placing an advertisement in a local newspaper; contacting the volunteer bureau.

### *Participants by Tasks & Activities*

At this stage it is also important to start to think who will be involved in which activities and undertake certain tasks, i.e. who will be doing what?

### **Scheduling and Monitoring**

This next stage, involves placing the project in 'real time', insomuch as all the tasks and activities, need to be sequenced and then placed against real calendar dates and times. It is akin to budgeting which is the setting of 'real' or expendable money against tasks and activities. Here, scheduling or time-tabling involves setting all the tasks and activities against 'real calendar time'.

### *Monitoring*

The actual completion of tasks and activities will form key 'milestones' or markers within your project. Monitoring is about knowing that both overall the project is on track, and that these key milestones are being reached, hopefully within budget. Therefore, it is about providing people who are undertaking agreed tasks and activities, with simple, quick mechanisms of reporting back to either you or into the project team. These mechanisms can include a phone call, an email, a report at a weekly meeting, detailing where their particular activity is up to, has it been completed or what additional action and costs might be incurred to complete it?

### **Costing the Project & Setting the Budget**

Each task and activity – as far as possible at this stage, now needs to be costed. What resources are needed? Itemise every single resource requirement you can think of to achieve all the tasks and activities listed in your plan above, (the number of teas and coffees, stationary, advertising costs, training, venues, equipment etc.).

Costing is where experience counts. If you are a small organisation or community based group, when you come to costing a project for real, check whether it is possible to call upon local external advice.

### **Evaluation Planning)**

*“Evaluation is the systematic process of collecting and analysing data in order to determine whether and to what degree objectives have been or are being met.”*

Potential funders are often looking for an indication that a project will be comprehensively and honestly evaluated. An evaluation provides the project with a lasting record, of what happened, why it happened and the impact of the project. It also acts to situate the project within the wider body of possible influence around social policy, which intergenerational practice might have.

When it comes to considering why an evaluation is undertaken, it is important to think back through the claims that have been made about the project, what where the expected outcomes and now that either the project is under-way it is important to make sure the project is achieving its aims.

- Making judgements as to how effectively its aims, objectives and values have been met;
- Assessing the outcomes for the participants;
- Making judgements about the impact the activity is having on the community and society.

All of these judgements have to be based on evidence being gathered. With this in mind are the outcomes and goals set, measurable and realistic? What can you measure within your project to demonstrate impact (i.e. what 'indicators' of impact would you choose), from whom would you gather the information and how would you gather the information and whom might you consider appropriate to gather this information? Also consider at what points in the project you would gather information. Who would write up the findings, and to whom would it be made available?

An evaluation is, therefore, based on the collection of data or evidence. Evaluation can be undertaken at the close of a project, however, good practice is that collecting evidence of change (e.g. change in self confidence) is best done at the time, and on an on-going basis throughout the implementation stage, as so much evidence can be lost after the event.

To make the process of evaluation accessible and involving of all participants, it can be useful to devise quite straight-forward and fun ways of collecting the information required. These can include: reflective diaries, interviewing participants, focus groups.

All participants can be included in the evaluation as the project will have had an impact on everyone involved. There might be a need to be 'selective' within this, if the group is very large; in this case a representative sample is useful.

One important consideration is whether to undertake the evaluation internally, i.e. through a member of the project team or to have it undertaken by someone external to the organisation. There are pro and cons in both methods. If you decide to undertake an internal evaluation, remember gaining the advice and support of someone who has undertaken an evaluation can be very helpful. It is therefore advocated for a multi-actor-based and multi-angled perspective on projects involving different stakeholders and different assessment methods as well as instruments.

Undertaking an evaluation is rather like undertaking a small piece of research. It should include elements such as the project's aims and objectives, its rationale, the proposed outcomes and who was involved in the project? How the evaluation was undertaken (the methods employed to gather information) and any ethical considerations around gathering such information and how they were met. A compilation of the information gathered (which can include quotes from participants etc.) and then some analysis of the information, and finally a conclusion.

A detailed methodology and related instruments on how to assess, evaluate and validate Intergenerational Activities such as the Big Foot Experiments on the ground is provided in the following Chapter 7.

**PROJECT PLANNING & RESEARCH**

<b>A) Research other Projects</b>	
<ul style="list-style-type: none"> <li>• Research what other projects are being doing.</li> <li>• Consult relevant data bases e.g. <a href="http://www.emil-network.eu">www.emil-network.eu</a>.</li> <li>• Use the learning to help develop your project – don't try to re-invent the wheel where it is appropriate to share good practice!</li> </ul>	<ul style="list-style-type: none"> <li>• Speak to other project coordinators and practitioners involved</li> <li>• Visit other projects in operation</li> <li>• Follow relevant practitioners to learn from them</li> <li>• Identify things that could work for your project and what you would need to change</li> <li>• Establish good relations with other projects to share good practice and lessons learnt</li> <li>• Ask questions about concerns that you have – others have come across similar issues in the past</li> </ul>
<b>B) Relevant Legislation</b>	
<ul style="list-style-type: none"> <li>• Research areas of legislation that are relevant to your project</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure that you are aware of child protection and protection of vulnerable adults issues and adhere to good practice guidelines</li> <li>• Careful consideration must be given to Health &amp; Safety issues</li> </ul>
<b>C) Consider Logistics</b>	
<ul style="list-style-type: none"> <li>• Consider and plan the essentials of the project in detail <i>(Many of the logistics are listed in the Project Plan Overview, so make sure this is up-to-date and that all partners have a copy.)</i></li> </ul>	<ul style="list-style-type: none"> <li>• Many of the logistics will centre around:             <ul style="list-style-type: none"> <li>○ Who?</li> <li>○ Where?</li> <li>○ What?</li> <li>○ Why?</li> <li>○ When?</li> <li>○ How?</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• Consider how the theoretical logistics will be turned into reality</li> </ul>	<ul style="list-style-type: none"> <li>• Use Action Plans to delegate tasks and actions</li> <li>• Specify who is responsible for each task and specify when tasks should be completed by when to keep project on track</li> <li>• Record general notes, details of progress, reasons for delays</li> </ul>

**Table 2:** Intergenerational Project Planning & Research

**PROJECT PLANNING & RESEARCH (cont.)**

<b>D) Plan Budgets</b>	
<ul style="list-style-type: none"> <li>Consider what budgets and resources will be required for the project and how these will be sourced</li> </ul>	<ul style="list-style-type: none"> <li>Predict and consider set-up and on-going costs</li> <li>List equipment / resources / IT / software etc required for the project</li> <li>To ensure your project is sustainable you must ensure you can permanently cover any on-going costs</li> <li>Remember, many activities need not cost vast sums of money. Some projects have been running successfully on a very low budgets.</li> </ul>
<b>E) Issue Plan and Contingency Plan</b>	
<ul style="list-style-type: none"> <li>Create an Issue Plan or Contingency Plan</li> </ul>	<ul style="list-style-type: none"> <li>Highlight likely or possible issues that may present in the duration of your project and how you intend to manage them should they occur</li> <li>Creating an issue plan will help you consider and plan for possible eventualities and help people understand how to react when under pressure</li> <li>Some examples and suggestions have been formulated and are demonstrated in Annex III</li> <li>You can't plan for every eventuality, but an issue plan will help set the tone for the approach that should be taken when reacting to situations</li> <li>Issue plans can be also used to answer some concerns that parents or relatives may raise</li> </ul>

**Table 2:** Intergenerational Project Planning & Research (cont.)

**PROJECT PLANNING & RESEARCH (cont.)**

<b>F) Risk Assessment</b>	
<ul style="list-style-type: none"> <li>● Create a health and safety risk assessment, considering risks to all involved in the project</li> </ul>	<ul style="list-style-type: none"> <li>● The point of a Risk Assessment is to identify risks along with appropriate ways to reduce and manage them</li> <li>● There is no such thing as a risk-free project, but risks can be well managed and minimised</li> <li>● Consider risks:               <ul style="list-style-type: none"> <li>○ Within the venue;</li> <li>○ Within transport arrangements;</li> <li>○ To coordinators / facilitators / tutors / trainers;</li> <li>○ To pupils, teenagers, young adults;</li> <li>○ To older people;</li> <li>○ To volunteers.</li> </ul> </li> <li>● Where you have identified measures to control risks, ensure these controls are carried out</li> <li>● Risk assessments should be reviewed following an incident, following a change in circumstances (e.g. change of venue) and on a regular basis</li> </ul>

**Table 2:** Intergenerational Project Planning & Research (cont.)



**PROJECT PLANNING & RESEARCH (cont.)**

<b>G) Plan Monitoring, Evaluation, Celebration and Promotion</b>	
<ul style="list-style-type: none"> <li>● Plan how you will monitor, evaluate, celebrate and promote the project</li> </ul>	<ul style="list-style-type: none"> <li>● Plan regular monitoring in order to accurately assess the impacts of your project over a period of time</li> <li>● Don't rely solely on retrospective evaluations – many impacts get easily forgotten or overlooked</li> <li>● Regular monitoring helps establish if the project is on course to deliver the benefits that you aimed to achieve</li> <li>● Provide monitoring forms (see next Chapter)</li> <li>● Celebrate the successes of the project once it is finished; suggestions include:               <ul style="list-style-type: none"> <li>○ Celebratory assembly with all involved actors and stakeholders e.g. participants, parents, relatives, other pupils etc;</li> <li>○ Holding a separate, independent celebration event locally;</li> <li>○ Present and showcase the project at conferences and other important events;</li> <li>○ Showcase project work and its evidences such as video, audio, texts, artefacts i) on the website of your organisation/s or other websites and/or organise an exhibition in the locations of organisations involved in the project.</li> </ul> </li> </ul>

**Table 2:** Intergenerational Project Planning & Research (cont.)

**PROJECT PLANNING & RESEARCH (cont.)**

<b>H) Plan Liaison</b>	
<ul style="list-style-type: none"> <li>● Agree with the Project Steering Group how you will liaise with participants and interested parties e.g. through participatory mapping, start-up public evenings and additional stakeholder consultations</li> </ul>	<ul style="list-style-type: none"> <li>● Plan how you will explain the project to, and liaise with:               <ul style="list-style-type: none"> <li>○ Older people;</li> <li>○ Pupils, teenagers, young adult;</li> <li>○ Relatives/carers of older people;</li> <li>○ Parents/guardians of school pupils.</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>● Agree what (if any) information sessions you plan to run, and who they will be for</li> </ul>	<ul style="list-style-type: none"> <li>● Topics may include mental health awareness raising for example, and could be for pupils only or may also include parents.</li> <li>● Integrate these sessions into the project programme</li> </ul>
<ul style="list-style-type: none"> <li>● Acquire consent for photographs (if required)</li> </ul>	<ul style="list-style-type: none"> <li>● When will you write to parents/guardians of pupils seeking consent for taking photographs?</li> </ul>

**Table 2:** Intergenerational Project Planning & Research (cont.)

### 5.3 Project Implementation

<b>PROJECT IMPLEMENTATION</b>	
<b>A) Action Liaison &amp; Information Sessions</b>	
<ul style="list-style-type: none"> <li>Put the planned liaison and information sessions (i.e. start-up public evenings, additional stakeholder consultations) into action</li> </ul>	<ul style="list-style-type: none"> <li>You may wish to use action plans to help with this</li> <li>Ensure appropriate consent letters have been sent ample time before taking photos / videos of the project in operation (if required)</li> </ul>
<b>B) Run the Project!</b>	
<ul style="list-style-type: none"> <li>This is the moment everyone has been working towards!</li> <li>A few suggestions from existing practitioners have been listed, right, you may wish to consider using</li> <li>Further advice on how to make intergenerational practice work can be found in the next chapter.</li> </ul>	<ul style="list-style-type: none"> <li>A few suggestions from existing practitioners include:               <ul style="list-style-type: none"> <li>Before the first session ask the young and old participants to come up with their own ‘contracts’ for behaviour – if they come up with the rules they may be more likely to stick to them</li> <li>Run a ‘recall’ session before the first week of the project so participants know what to expect</li> <li>Use name badges that also include other interesting information about the person, such as their interests etc. These can be great conversation-starters!</li> <li>Allow time between sessions to reflect on the last session and prepare for the next one.</li> </ul> </li> </ul>

**Table 3:** Intergenerational Project Implementation

**PROJECT IMPLEMENTATION (cont.)**

<b>C) Monitor &amp; Record and Mid-Term Review</b>	
<ul style="list-style-type: none"> <li>● Implement the planned monitoring and recoding processes</li> <li>● Review the project in the middle and after the end with all participants and various external stakeholders</li> </ul>	<p>Guiding question could be:</p> <ul style="list-style-type: none"> <li>● In practice, is the project:               <ul style="list-style-type: none"> <li>○ Mutually beneficial?</li> <li>○ Meaningful?</li> <li>○ Fun and enjoyable?</li> </ul> </li> <li>● Is the project on course to deliver its aims?</li> <li>● Keep a record of all participants</li> <li>● Take photos or videos</li> <li>● Record examples of individuals that are particularly benefiting / developing from the project</li> <li>● Record lessons learnt for future reference</li> <li>● Monitor issues such as budgets, how the project continues to fit in with timetables etc</li> </ul>

**Table 3:** Intergenerational Project Implementation (cont.)

## 5.4 Celebrate, Close & Review

CELEBRATE. CLOSE & REVIEW	
<b>A) Celebrate Success</b>	
<ul style="list-style-type: none"> <li>Put planned celebration events into action - end the project on a positive note!</li> </ul>	<ul style="list-style-type: none"> <li>Celebrating success is very important in empowering participants and contributors to recognise what they have achieved.</li> <li>Ending your project on a positive note is more likely to encourage those involved to get involved in similar initiatives in the future.</li> </ul>
<b>B) Present Project Outputs</b>	
<ul style="list-style-type: none"> <li>Showcase the materials produced by your project (such as maps, books, videos, audio, stories, models, scrapbooks, posters etc.)</li> </ul>	<ul style="list-style-type: none"> <li>Where possible, do this in places where people from outside the project can see what the project has achieved and participants take pride in what they have produced e.g. in public places of partner organisations</li> </ul>
<b>C) Publish Successes</b>	
<ul style="list-style-type: none"> <li>Publish the successes of the project to a wider audience</li> </ul>	<ul style="list-style-type: none"> <li>Suggestions include:               <ul style="list-style-type: none"> <li>Use the provisions of the organisation/s e.g. websites and the presence in social networks;</li> <li>Press release in local newspapers;</li> <li>Showcase on municipality premises and /or website;</li> <li>School / older person's establishment and/or website;</li> <li>Use newsletters;</li> <li>Other websites i.e. the European Map of Intergenerational Learning (EMIL; <a href="http://www.emil-network.eu">www.emil-network.eu</a>) etc;</li> <li>Create posters;</li> <li>Tell people in reality and on the Web!</li> </ul> </li> </ul>

**Table 4:** Celebrating, Closing & Reviewing Intergenerational Projects

**CELEBRATE. CLOSE & REVIEW (cont.)**

<b>D) Thank All Involved and Close Project</b>	
<ul style="list-style-type: none"> <li>• Thank participants and staff and close the project</li> </ul>	<ul style="list-style-type: none"> <li>• Thanking those involved is a great way to close a project, and helps to recognise the time and energies that people have contributed.</li> <li>• One idea might be to ask the young people pupils to write 'thank you' letters to the older people and other participants, such as staff and vice versa if possible. This has educational value in the form of letter writing and helps to teach the importance of manners and respect.</li> </ul>

**Table 4:** Celebrating, Closing & Reviewing Intergenerational Projects (cont.)

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Notes:





## 6. Do's & Don'ts in Intergenerational Practice

This Chapter highlights some essential do's and don'ts of intergenerational practice in order to support practitioners to make their own intergenerational project to work to the best possible.

In the publication 'A Guide to Intergenerational Practice' by the Beth-Johnson-Foundation (BJF) the following aspects are essential to make intergenerational practice work or work better:

- The importance of laying appropriate foundations;
- The necessity to make the business case;
- The acknowledgement of potential risks in intergenerational practice incl. i) reinforcing negative stereotypes, ii) romancing the past; iii) cultural differences; iv) safety and confidentiality issues;
- The importance of intensive monitoring, evaluation and reporting.

Similarly the report 'Engagement – A Strategic Review of Intergenerational School Projects within Rhondda Cynon Taf' suggests ways to overcome challenges of intergenerational projects with the involvement of school pupils, amongst them:

- The need to challenge stereotypes;
- Parental concerns;
- The role of resources;
- Health & safety concerns;
- Inappropriate behaviour of older participants;
- Likelihood of badly behaved pupils, teenagers or young adults;
- Dealing with bereavement;
- The role of the project co-ordinator.

Finally the Manchester's Intergenerational Practice Toolkit entitled 'Creating Connections, Breaking Down Barriers' highlights the following ways to overcome existing barriers between the generations:

- The importance of carefully planning the first meetings between the generations: i) meeting the two age groups separately; ii) the first meeting between the two age groups;
- The necessity to explore the stereotypes of younger and older people through four themed group discussions;
- The need for an in-depth evaluation and the drafting of lessons learnt as well as suggesting recommendations for future projects and funders.

In the following the respective chapters of the above mentioned publications are reported in original and in full length.

## 6.1 Making Intergenerational Practice Work (BJF)

### Laying the Foundations

Many people already working with communities will have a good understanding of what it needs to produce positive results through applying Intergenerational Practice on the ground locally. However, systemic changes such as those required to deliver on the government's ambitious devolution agenda will necessarily engage many more people who initially may not share this experience and understanding at the day-to-day level. It is therefore useful to set out some of the basic essentials.

The essence of Intergenerational Practice lies in building trusting relationships between all those participating, whether at project level or more strategically. This level of mutual confidence is necessary to ensure that the great potential for reciprocal benefits – the 'win wins' – are realised. A good base of community engagement skills is essential to Intergenerational Practice – skills such as:

- Setting up and running meetings;
- Creating and delivering public presentations;
- Facilitation;
- Communication.

The involvement of facilitators who have a background of working in neighbourhoods and with communities offers the best possible start, and fits comfortably with the aims for building the Big Society.

It is important to recognise that communities can be complicated things – just as the individuals living in them are. Communities may define themselves and definitions of community can and do change. People often belong to more than one community and communities are often very diverse. Communities can be:

- Communities of Place – people within a defined geographical area and/or;
- Communities of Identity – as defined by those people, such as ethnic groups, people who share a particular experience, interest or stake in an issue, or characteristics such as young people, faith groups, older people, people with disabilities, ethnic groups, and lesbian, gay and bisexual people.

This complexity, combined with the increasing need to do more effective work on fewer resources, puts even greater value on following some key steps when considering Intergenerational Practice development.

At the earliest 'design stage', it makes sense to consider some fundamental questions, including:

- What are you going to do?
- Why are you choosing an Intergenerational Practice approach?
- What form(s) of Intergenerational Practice will work best and why?
- Who will you be working with?
- When and where will you be doing it?
- What outcomes are you seeking?

Intergenerational Practice is relevant across all generations, but a significant majority of work has focused upon the two ends of the life course, younger people and adults above working age. When planning intergenerational work, establishing a clear idea of what is meant by the terms 'age', 'age group' and 'generation' is often neglected. Within Intergenerational Practice 'older people' are commonly defined as 50+ years and 'younger people' as 12 – 25 years old. However, such broad brush categorisation risks obscuring some vitally important factors. A lot of valuable Intergenerational Practice work is based in primary schools and even the most superficial consideration will demonstrate that the needs, expectations and aspirations of individuals change tremendously across the life course. So another set of preliminary questions will be helpful:

- What is a younger person? What is an older person?
- How are you defining your 'target' age groups and why?
- How do they view their own and one another's ages?
- How does the wider community/society view them?

### **Making the Business Case**

Important though these initial 'what', 'who' and 'why' questions are, national and international economic pressures demand increasingly that services be planned and delivered on a 'more for less' basis. More than ever before, it is essential for those considering the use of Intergenerational Practice to be able to demonstrate that it is capable of delivering effectively across the wider economic, environmental and social priorities of local communities. Both the current public spending reforms and the Big Society proposals present challenges and opportunities for Intergenerational Practice. It is therefore important to have a sound rationale for taking forward Intergenerational Practice and to be able to demonstrate tangible positive impacts against the backdrop of budget cuts and competing priorities. These 'hard conversations' will need to consider:

- The level of strategic support there is for Intergenerational Practice, including elected member support;
- The level of wider stakeholder support across sectoral boundaries;
- Clarity of the Intergenerational Practice outcomes;
- The extent to which multiple outcomes are identified and addressed;
- The impact of the Intergenerational Practice on resource allocation/value for money and who else might be involved from different departments/organisations;
- Whether potential savings/risks have been identified;
- What sustainability measures are in place;
- Rigorous systems for monitoring and evaluation.

### *Some Risks in Intergenerational Practice*

Intergenerational Practice is a very potent tool for achieving positive outcomes across a wide range of issues that are at the centre of current decision-making for service delivery in communities. But Intergenerational Practice is certainly no magic wand and it is useful to be aware of some of the problems that can occur when working across generations.

### Reinforcing Negative Stereotypes

Working with younger and older people – those generations most often engaged with Intergenerational Practice – involves contact with and between two groups which suffer significantly from negative stereotyping of one another and from society at large. Young people in particular are often demonised within the media and both groups are often viewed from one perspective; that of the problems and challenges they are seen as posing to society. This is a prejudice with a long history:

*“When I was young, we were taught to be discreet and respectful of elders, but the present youth are exceedingly disrespectful and impatient of restraint”.*

*Hesiod, Greek poet, 8th century BCE.*

If younger and older people are being brought together through Intergenerational Practice, at an early stage some stereotype analysis needs to happen. Many examples of Intergenerational Practice work have the specific purpose of dispelling myths about younger and older people and thereby attempt to bring about greater civic participation from all. To do this well, participants must work together to develop an environment of mutual trust and confidentiality and then use this as a platform from which to dispel myths they may have of each other. After this, any wider social stereotype beliefs may be tackled.

The risk is that with inappropriate facilitation that essential environment of trust will not be created and the negative views can be reinforced rather than dispelled.

### Romancing the Past

Reminiscence programmes are a regular feature of Intergenerational Practice, representing a popular base upon which to build better mutual understanding between generations. But they can also lead to assumptions that it was better in the past and it is bad now:

*“The reason people find it so hard to be happy is that they always see the past better than it was, the present worse than it is and the future less resolved than it will be”*

*Marcel Pagnol, French novelist, playwright and film-maker, 1895 – 1974.*

This stems partly from Intergenerational Practice focusing on problems within communities rather than building on their strengths. To co-ordinate Intergenerational Practice best, at some stage there must be an analysis of the community carried out. This will help to understand local issues and to recognise the perspectives that local people from different generations may bring with them from their different life experiences.

### Culture

People from different cultural backgrounds will often have different experience and expectations around how younger people should act around older people and the differences may also reflect the gender of those involved. In some cases, the definitions of what constitutes ‘young’, ‘adult’ and ‘old’ people will differ quite widely. If Intergenerational Practice is being co-ordinated with a range of people from different backgrounds, their cultural heritage should be factored in and different customs recognised.

**Safety and Confidentiality**

Intergenerational Practice will often involve close personal contact between the participants – in many ways this is one of the great strengths of the approach. Within this context, it is of course essential that it takes place within an environment that ensures the physical safety and mental well being of those taking part, as well as the confidentiality of any personal information that may be shared.

**Monitoring and Evaluation**

In the 'more for less' environment, the competition for resources is becoming increasingly fierce within and between organisations. Consequently, demonstrating the wider benefits of any policy action is more crucial than ever. In common with many areas of social action based in communities, those advocating Intergenerational Practice at local level will need to address the perceived tensions between what have become known as 'hard' (quantitative) and 'soft' (qualitative) outcomes.

## 6.2 Overcoming Challenges of Intergenerational Projects (RTC)

Before each Project is established there will be a number of hurdles that have to be overcome in order for it to be a success. Current Project practitioners have helped identify many of the likely challenges and, more importantly, suggested ways of overcoming them.

### Challenging Stereotypes

Prior to Projects commencing, both older and younger people have often held negative stereotypes about the other generation that may discourage them from participating.

To help overcome this school pupils have been given presentations about mental health and ageing so they understand more about the people they would be engaging with. They have also visited the setting prior to the start of the Project so they knew where they were going.

Older people and their families and / or carers were consulted prior to the start of the Project to establish whether or not they wanted to participate and to discuss how the Project would work in more detail. Although at first some of our older participants were reluctant due to negative perceptions of younger people, reassurance about the pupils being supervised and a little gentle persuasion to 'give it a go' has enabled them to become involved. We have found that some of the older participants who now enjoy the Projects most are the same ones that were most reluctant to get involved in the first place!

### Parental Concerns

There were fears that some parents / guardians would raise concerns about their children interacting with older people with mental ill health.

To overcome this, meetings have been arranged to explain the Project work in more detail and provide parents with an overview of mental health and dementia in order to break down their concerns or prejudices. This has also been of benefit by exposing parents to health and social care settings.

The meetings have been linked to recruiting Project volunteers, allowing parents / guardians the opportunity to become involved in the Project.

### Resources

It is easy to presume that Projects cannot be undertaken unless significant funds and resources are allocated. This is not necessarily the case.

The most significant resources required are time, commitment and energy as it takes all of these to both establish a Project and sustain it in the long term. We have found that many additional resources are 'core' items that can be found for little or no cost.

For example, Schools have contributed resources in terms of paper, pens, books etc. as well as staff time through Community School Cluster Workers to establish the Projects and teaching staff or Learning Support Assistants to run the project week-to-week. Likewise, care establishments and housing complexes often host the Projects and have also provided resources, such as squash and biscuits and staff time in the form of care or support staff.

Keeping costs low and using everyday resources enable the Projects to become sustainable in the long term and not reliant on additional funds.

Probably the main obstacle that has yet to be completely overcome relates to provision of transport for Projects where the school and older person's setting is not within walking distance, although in some instances this has been met through school staff driving pupils in their own vehicles.

### **Health & Safety Concerns**

Concerns have been raised with regards to health and safety issues, particularly as the Projects work with older people, many of whom may have some form of mental illness, and school pupils; two sets of vulnerable groups.

Through approaching Intergenerational School Projects with the same diligence that schools adopt for other external visits, assessing risks and using common sense, the Projects can be set up and managed safely.

Care establishments and housing complexes complete risk assessments covering their premises, whilst schools also create risk assessments covering pupils activities and external visits. Using and developing these with people involved in Project delivery will give the Project a sound base to run safely.

### **Inappropriate Behaviour of Older Participants**

There are often concerns about some of the older participants acting inappropriately due possibly to mental ill health or differences in what language or opinions are deemed 'appropriate'.

Much success in overcoming this challenge lies in preparation before the Project begins. Those who work with the older participants should use their understanding of their clients to establish things such as who is likely to have unpredictable moments, what are their likely trigger points, what can be done to manage their behaviour and where could they go if they no longer wanted to be involved in the session. It is also important to prepare the older participants prior to the Project, establishing simple guidelines as to what is and isn't appropriate.

### **Likelihood of Badly Behaved Pupils**

It would be easy to presume that the best way to manage this would simply be to exclude probable 'troublemakers' from participating. However, our practitioners have found far more effective ways of engendering good behaviour of school pupils.

As previously stated, pupils receive talks about the people that they will be engaging with, and these sessions can be used to help them learn a better understanding of the importance of good behaviour.

In some of the Projects pupils are asked to create their own 'contracts for good behaviour' as they are more likely to adhere to their own rules rather than some set out by a teacher. This exercise also helps younger participants learn and understand the importance of listening to other people, respecting other people's space and belongings and the importance of treating everybody with respect and dignity.

Supervision in sessions is of course important, although it should be noted that previous experience has shown many of the typical 'troublemakers' adopt a completely different behaviour when participating in Intergenerational School Projects – another of the positive impacts created by the Projects.

### **Dealing with Bereavement**

As many of the Projects are run over the course of a number of weeks, months or even a full year, it is possible that a participant may pass away during that time. This has been raised as a concern, particularly by parents and teaching staff.

Bereavements have been very rare, but are obviously very sad occasions. Where a bereavement has occurred it has been used to help pupils learn about death and how to manage and express their feelings, with teaching staff and LSA's helping pupils to celebrate life rather than concentrate on death. Pupils have been encouraged to express positively how they feel through writing or drawings, sending cards or flowers or by holding a school service.

Pupils learn that it is OK to be 'sad' but, through positive reminiscence, they are supported in celebrating a person's memory.

### **The Role of Project Co-ordinator**

Setting up a Project takes a lot of time, commitment and energy, and is not necessarily something that can easily be slotted into a teaching, caring or supporting job role.

The establishment of some of the Intergenerational School Projects have been co-ordinated by Community School Cluster Workers, responsible for supporting the cohesive delivery of services amongst children, families and the wider community within their cluster. Where this has been the case, their contributions have been invaluable to the successes of the Project and have made the process easier for the school and the care establishment or housing complex.

A challenge for the Cluster Workers is being able to 'step away' once the Projects have been established and are in a position where they can be sustained between the school and the care establishment or sheltered housing complex. This demonstrates the importance of agreeing roles and responsibilities early on in the Project set-up process, including what the role of the co-ordinator will be once the Project is firmly established. There are no 'rights' or 'wrongs' about what this role should be once the Project has been established, but it should be agreed by all parties from the beginning.



## 6.3 Overcoming Barriers between Generations (Manchester)

There are various ways of addressing the gaps which may exist between people of different generations. This section looks at how you can bridge these by bringing the two age groups together through a gradual process with careful planning. It then suggests a number of discussion points that will help people explore ageist assumptions.

### Meeting the two age groups separately

Older and younger people may not have regular contact with each other and there could be an element of fear or distrust, particularly amongst older people who know very few young people.

One way to avoid difficulties between your older and younger participants is to begin by building a separate relationship with the two age groups before they meet.

This helps by:

- Enabling each generation to develop its own voice and share initial anxieties.
- Allowing people to get to know each other and gain confidence in a smaller group.
- Making people aware of the challenges and encouraging them to address negative attitudes.
- Starting the process of sharing ideas about where the project is going.

Issues to discuss together at this stage include: appropriate boundaries, language and physical contact; confidential information; child protection; recording the work (for example use of photographs); and creative outcomes.

A key talking point at this stage is the similarities and differences between the generations. The discussion guidelines below will help you here.

### Your first meeting with both age groups

Once you have built a relationship with the different generations separately, it is time to bring them together. Participants may still feel doubt or distrust. To help overcome this, always plan and manage your first meetings well.

*1. Know who is coming and what the meeting space is like.*

It is always helpful to visit the space where you will first meet and/or carry out your project or programme. Know the safety issues, where the toilets are, any planned fire drills, availability of refreshments, the size of the space, and accessibility issues. Where possible use venues that are neutral to both age groups or discuss the venue choice with participants before activities start.

*2. Be clear about the purpose of the first meeting.*

Have clarity in your own mind and communicate this to participants. If possible, send them information or speak to them about the meeting's purpose beforehand.

*3. Be clear about the purpose of the project.*

Talk to participants about why you are doing the project, the scope for it to change, how it will be carried out, and the timescales.

4. *Have back-up plans.*

What will you do if something doesn't go to plan? As far as we know you can't see into the future, but try to be prepared to deal with tricky or surprising questions or responses.

5. *Be aware of what has happened in the past in that neighbourhood.*

You could duplicate things that didn't work, or ask questions which people have already answered (for example if you are running a consultation) which will just serve to annoy people. Consider what you could build on, such as existing partnerships, networks and learning.

**Meeting checklist**

This checklist is based around resources developed by the Beth Johnson Foundation. It looks at some practical issues you need to address when bringing together younger and older people at a venue.

Pre-planning	All required policy and insurances are in place. For example child protection, safeguarding and CRB checks.
Preparation/marketing	Everyone has been informed of what the project/work is about. Information is accessible (minimum size 12 font) and partnerships finalised.
Paperwork	Partnership agreements and contracts set up, consent forms for photographs/trips, and registers. Confidential database set up and protocols for use established. Location Transport requirements identified. Is the area safe and well lit and accessible by a range of travel options?
Venue	Check: <ul style="list-style-type: none"> <li>○ Disability access</li> <li>○ Equipment available</li> <li>○ Room size and space for your use</li> <li>○ Seating</li> <li>○ Risk assessment completed</li> <li>○ Hearing loops</li> <li>○ Access to building</li> <li>○ Contact for any problems</li> </ul>
Facilities	Know what facilities are available, such as: <ul style="list-style-type: none"> <li>○ Toilets</li> <li>○ Kitchen</li> <li>○ First aid</li> <li>○ Refreshments</li> </ul> Check: <ul style="list-style-type: none"> <li>○ Fire alarm tests</li> </ul>

**Table 5:** Meeting Checklist of the Manchester IP Toolkit

Staffing	<p>All staff informed about the work</p> <ul style="list-style-type: none"> <li>○ First aider available</li> <li>○ Adequately trained staff</li> <li>○ Contact information</li> </ul>
Volunteer	<p>Contact information</p> <ul style="list-style-type: none"> <li>○ Training</li> <li>○ Support</li> <li>○ CRB (Criminal Records Bureau) if required</li> <li>○ Volunteer policy which includes arrangements for support</li> </ul>
Activities	<ul style="list-style-type: none"> <li>○ Risk assessment has been completed</li> <li>○ Equipment has been checked</li> <li>○ Impact of project on individuals</li> <li>○ If outdoors, are there sheltered areas?</li> <li>○ Equipment is accessible for everyone</li> <li>○ Data protection</li> </ul>
Participants	<ul style="list-style-type: none"> <li>○ Informed about what's going to happen</li> <li>○ Have realistic expectations</li> <li>○ Have awareness of individual needs</li> </ul>

**Table 5:** Meeting Checklist of the Manchester IP Toolkit (cont.)

### Exploring stereotypes of younger and older people

The discussion points below will help people explore their underlying assumptions about younger and older people. They could be used as part of a planning session involving participants, or as part of the intergenerational project itself.

People commissioning, planning or delivering intergenerational projects will also benefit from considering these issues.

#### *Discussion 1: Perceptions of younger and older people*

If you pick up a newspaper, turn on the TV or radio, or log onto a website, you will often hear something that implies young people are out of control and older people are a burden. Both groups are viewed as problems to be solved rather than as citizens who can be an asset to society. We also often hear that things are much worse today than in the past.

But why is this and what are these views based on?

- Was society better in the past?
- If so, what evidence do you have and who was it better for?
- Are young people a problem today?
- If so, why? If not, why?
- Are older people a problem today?
- If so, why? If not, why?

*Discussion 2: Conflict between generations*

Relations between older and young people are often characterised as pretty poor. Some people think that they have been getting worse for some time. According to this scenario, young people spend their time dreaming up new ways to frighten and harass people, and older people have had a collective humour by-pass.

But what information is this really based on?

- How would you describe relations between younger and older people today?
- What evidence do you have to support this?
- Do you think that some conflict between the generations is inevitable?
- Is generational conflict a bad thing?

*Discussion 3: Building positive relations between generations*

It is often said that there are now fewer opportunities for different generations to meet one another. This implies that they met often in the past, and that if they met more frequently nowadays, relations and understanding between the two would be better. But we know from experience that just bringing together two generations and hoping for the best can be unhelpful.

We assume that more contact between generations would be a good thing for those involved and for the wider community. And we tend to focus on what young people can learn from older people so that they can change for the better, without considering how older people can change.

- Is it important for younger and older people to make conscious efforts to meet?
- What would be the purpose of creating such meetings?
- What do you think young people have to learn from older people and why?
- What do you think older people have to learn from younger people and why?
- Do all older people automatically have things of value to share with young people?

*Discussion 4: Shared concerns of younger and older people*

Younger and older people often say that people in positions of power and responsibility don't really listen to them.

- What do you feel are the key concerns of older and younger people today?
- What knowledge do you base this on?
- Do younger and older people have concerns in common or are they very different?
- Can you identify three areas of common concern and suggest how these could be addressed – by older and younger people co-operating, by the wider community, and by local and central government?

### Top-12 mistakes in intergenerational projects

This list of the top 12 mistakes that can be made in intergenerational projects is based on research from across the UK and on experience gained from Manchester's Generations Together programme.

- 1) Not preparing the groups individually and collectively.
- 2) Not having a mutually beneficial element for both groups.
- 3) Ignoring the experiences and beliefs of participants.
- 4) Not exploring the generational stereotypes in involved groups.
- 5) Trying to recruit people for boring activities.
- 6) Not sufficiently planning of the project.
- 7) Not having committed and active partners.
- 8) Untrained and/or inexperienced staff.
- 9) Not considering the appropriateness of the approach to achieve the aims.
- 10) Not considering the time commitment of involved partners.
- 11) Using a short term and one-off approach.
- 12) Not understanding the concerns of participants and what stage they are at in their lifecycle.

### Evaluating your project

Evaluation is central to any intergenerational project. You must be able to demonstrate that what you plan to do will deliver value for money and have a positive impact on the residents of the experimentation ,territory'. So every project or programme must have:

- A clear purpose or objective.
- A clear process to carry this out.
- A clear process of evaluation, based on the purpose of the project, at the start, middle and end.
- Results – especially in terms of the work's impact and what it has changed.
- A clear rationale for developing it further if future work is planned.

Our final piece of advice: to make your intergenerational project successful, always be clear on what you are doing, why you are doing it, who you are doing it with, where you are doing it, when you are doing it, and how you are doing it.

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## 7. Assessing, Evaluating & Validating the Big Foot Experiments

This Chapter sets out in more detail procedures for assessing, evaluating and validating intergenerational activities such as the Big Foot experiments; suggest related instruments, including a template for summarising the results of these activities.<sup>2</sup>

The methods and tools used in the evaluation and validation of the experiments are based on the following requirements:

- *Triangulated*: i.e. data need to be drawn from different sources, reflecting the perspectives of different actors and their different constructions of reality;
- *Multi-methodological*: i.e. different types of data need to be gathered incl. statistical data (e.g. from user profiles), secondary data (e.g. evaluation reports) and primary data (e.g. user surveys);
- *Discursive*: i.e. able to capture the 'discourses' and 'communicative practices' of the learning processes.

Ideally four data collection instruments are suggested, but due to the economy of many projects (e.g. on time and resource constraints as well as on the availability of existing material), the data collection and analysis process would be based on at least three out of the four following elements:

- Step 1: A desk research based content and report analysis. Providing an overview of the project set in its wider socio-economic context. The data can be largely determined from the suggested Participatory Mapping approaches.
- Step 2: Interviews (e.g. face-to-face; focus groups; telephone / Skype; web) with key stakeholders (i.e. programme or case managers): The interviews will focus on the key issues for each project and the implicit values coming through the interviewee's narrative. In order to achieve this special emphasis will be put on the barriers/obstacles to achieving the value related aims and objectives of project. The interview should therefore be open-ended and preferably face-to-face. The objective is to avoid eliciting simply more rhetoric/theory, but to assess how the case understand, evaluate, negotiate and build those broad values in practice.
- Step 3: The involvement of learners or end-users either through Self Administered Questionnaires (SAQs; where possible pre-/ex-ante and post-/ex-post to the experiment), Focus Group Discussions, Participants Feedback Sheets in order to achieve an adequate picture from real life worlds of the experiment and their impact on their participants.

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<sup>2</sup> This Chapter is based on a number of European Research & Development (R&D) projects where the suggested methodology and instruments have been successfully applied e.g. Links-up ([www.links-up.eu](http://www.links-up.eu)) and similar. The drafting of this Chapter would not have been able without the contributions of Joe Cullen, Arcola LLP, United Kingdom.

- Step 4: Observation and study visits of the actual learning in practice incl. the collection of products and artefacts: Data collection combines both own observations of the event together – where possible – with the observations of participants taking part. Both, the interviews of Step 2 and 3 and the observations of Step 4 should be tailored for each experiment according to the key themes identified within Step 1, but taking into account a set of common denominators as documented down in the Screening Questionnaire for Intergenerational Activities.

The methods and instruments for assessing, evaluating and validating intergenerational activities provided below are as follows:

1. Participant's Feedback Sheets

Simple sheet to record the mood as well as the achievements of a single participant on a specific day of the experiment.

2. Key Informant Interview Schedules

Schedule of prompts to structure a (face-to-face) interview with a key informant.

3. User Self Administered Questionnaires (SAQs)

Self-administered interview schedule to be used with learner/end-users.

4. User Focus Group Guidelines

How to run a focus group and the key questions that need to be asked.

5. Observation Guideline

Semi-structured schedule to record field observations of the settings in which activities undertaken by the initiative take place, and the activities observed.

6. Content Analysis Checklist

Procedures and structure for analysing secondary data (reports; outputs; project media).

7. Automated Data Collection Guidelines

Online statistical weblogs of the Big Foot web site and experimental online spaces.

8. Behavioural Additionality Analysis

A tool to estimate both individual and aggregate changes in intergenerational learning and social interaction behaviours associated with participation in the experiment.

9. Data Synthesis

9.1 Profile of the Experiment

9.2 Summary of the Experiment


Templates to develop a concise profile and characteristics and to summarise the main outcomes of the experiment.

Many examples in the above listed instruments refer to the concrete experiments of Big Foot and need to be adapted to the specific requirements and needs of new activities and/or projects before being used.



## 7.1 Participant Feedback Sheet

Today's Date: \_\_\_\_\_

<p><b>What was good about today?</b> For example, what did you learn or discover and how?</p>	<p><b>Tick the words that describe today or add your own words underneath:</b></p> <p>Fun                                      Enjoyable          Helpful                                  Positive          Stimulating                              Friendly          Interesting                                I asked questions          I listened well                            I learnt new things          OK    Hard work          Boring                                      Not enjoyable          Unfriendly                                Negative          I didn't pay attention</p>
<p><b>What was not so good about today?</b> What did you not enjoy, find uninteresting or too difficult?</p>	
<p><b>I was happy / not happy with things because...</b></p>	
<p><b>How would I rate my overall level of contribution?</b></p> <p>100%    75%    50%    25%    0%</p> <p>(Total) (Good) (Average) (Poor) (Nothing at all)</p>	<p><b>Overall, how do you feel about today's session?</b></p> <p></p>

**Table 6:** Participant Feedback Sheet

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Notes:

## 7.2 Key Informant Interview Schedule

### INTRODUCTION

As part of experimental approach, we are interviewing ‘key informants’ who are closely involved in the Intergenerational Activities being studied. The purposes of this interview are:

- To gather information about what the aims and objectives of the initiative and what it does;
- To assess its key outputs, outcomes and impacts;
- To find out what problems have been encountered and how they have been addressed.

All information provided in this interview will be anonymised.

### SECTION 1: Background Information

1.1 Name of Activity:

1.2 Name of person interviewed:

1.3 Organisation of person being interviewed:

1.4 Role in organisation of person being interviewed:

1.5 Contact details:

### SECTION 2: Description of the Activity

2.1 Could you briefly describe, in your view, what this activity does, and what are its aims and objectives?

2.2 When did this activity start?

2.3 How did it start? (What circumstances led to it starting? What needs was it intended to address? Who was involved?)

2.4 Who provided the funding to start and maintain the activity?

2.5 What key stakeholders/partners are involved and what do they do?

2.6 What would you say is innovative about this activity?

2.7 In what ways has the activity changed since it started? Why have these changes occurred?

**SECTION 3: Learning: What and who is involved**

- 3.1 What kind of intergenerational learning is provided by this activity?
- 3.2 What are the profiles of the learners (What target groups? What age groups? How many users? Are 'special learning needs' involved?)?
- 3.3 What kind of outputs has been produced (e.g. courses; content)?
- 3.4 Is there a particular pedagogic model that is used to deliver learning?
- 3.5 Are learners/users actively involved in the development and delivery of learning (e.g. Do learners/users contribute to content creation?)?
- 3.6 Can you describe how learning is delivered (e.g. What is the setting? How do learners/users access the services provided?)?
- 3.7 Aside from learners themselves, who else is involved in delivering learning (e.g. trainers; mentors; teachers)?
- 3.8 What are the organisational arrangements that support the learning process?

**SECTION 4: Technological Approach and Use of Web 2.0**

- 4.1 Can you describe the technological approach used in the activity (e.g. the hardware platform; software tools; how users access the platform)?
- 4.2 What kinds of Web 2.0 tools are used (e.g. blogs; wikis; social bookmarking; others)?
- 4.3 Why were these Web 2.0 tools chosen?
- 4.4 In what ways do the Web 2.0 tools enable learners/users to actively contribute to learning (e.g. Do they help learners to create learning content? Do they help learners to share information with other intergenerational learners? With teachers/trainers/facilitators?)?
- 4.5 Has the use of Web 2.0 tools changed the way the activity operates (e.g. Has it led to changes in the organisation?)?

**SECTION 5: Outcomes and Impacts**

- 5.1 Would you say the activity is achieving its objectives? In what ways?
- 5.2 What kinds of problems have been experienced and how have these been addressed?
- 5.3 What would you say are the main learning outcomes of the activity for individual learners and what evidence is available to support this?
- 5.4 What kinds of skills and competences have been supported by this activity (e.g. 'soft' skills like intergenerational solidarity; citizenship; self-esteem; ICT skills; operational / managerial skills)?
- 5.5 In what ways would you say the activity helps equip users with skills that will increase their labour market opportunities?

5.6 In what ways would you say the activity has an impact beyond the individual (e.g. contributing to intergenerational understanding; local community development; regional re-generation; inclusion of remote / mountainous regions: increasing social capital)?

5.7 Has the activity created things that were unexpected, or things that have had negative outcomes?

5.9 Were technical problems experienced in using Web 2.0 tools? Did the use of Web 2.0 tools create any other problems in relation to interactions between users and other actors?

5.10 In what ways do you think the activity could be improved?

### **SECTION 6: Costs, Exploitation and Sustainability**

6.1 Could you provide any information on costs and income (i.e. initial start up costs; capital costs; running costs; income generated)?

6.2 What exploitation strategies have been considered and/or implemented (e.g. commercial activities; expansion opportunities)?

6.3 How sustainable would you say the activity is (what plans are there to keep it going)?

### **SECTION 7: Intergenerational and Inclusion Aspects**

7.1 What kinds of 'excluded groups', especially when looking to older and younger people are targeted by this activity?

7.2 What needs of these groups does the activity address?

7.3 What are the intended outcomes of the activity in terms of promoting intergenerational understanding and social inclusion?

7.4 How are these intended outcomes being addressed?

7.5 What Web 2.0 tools are being used to promote the activity and in what ways?

7.6 To what extent and in what ways does the use of Web 2.0 tools enable users to be actively engaged in the activity?

7.7 What are the main outcomes for users of being involved in the activity in terms of promoting intergenerational understanding and social inclusion?

7.8 Would you say the activity is contributing to supporting inclusion at the wider level (e.g. developing community capacity / cohesion; regional re-generation; social capital)?

7.9 Has the activity promoted things that were unexpected or had negative outcomes in terms of inclusion?

7.10 Has the activity triggered developments in other areas as listed above (e.g. health)?

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*Notes:*

### 7.3 User Self Administered Questionnaire (SAQ)

#### Introduction

This Self Administered Questionnaire (SAQ) is intended to be completed by learners / end-users involved in the Intergenerational Activity. It provides a generic template that may be needed to be adapted to suit the particular activity. For example, questions on ethnicity will need to be tailored to a particular location. Delivery of the SAQ will need to be negotiated with the representatives of the activity (e.g. during face-to-face meetings; via the initiative’s own website; directly via e-mail).

As part of the experimental approach, we are carrying out a survey of people who are involved in the activity. The survey aims to give us an understanding of:

- The profile of people involved;
- What they expect to get out of being involved;
- Their experience of participating, including problems encountered;
- What benefits they got from participating.

All the information collected from this survey will remain confidential and will be anonymised. No information collected will be attributable to individuals or will be divulged to third parties.

#### Example 1: SAQ Both Generations

SAQ Ref no: (Office use only)

#### **SECTION A: Some information about you**

<b>1</b>	<b>What is your age group?</b>									
	Under 11	<input type="checkbox"/>	11-16	<input type="checkbox"/>	17-21	<input type="checkbox"/>	21-30	<input type="checkbox"/>	31-45	<input type="checkbox"/>
	45-60	<input type="checkbox"/>	Over 60	<input type="checkbox"/>						
<b>2</b>	<b>Are you:</b>				Male	<input type="checkbox"/>	Female		<input type="checkbox"/>	
<b>3</b>	<b>Are you currently at school?</b>				Yes	<input type="checkbox"/>	No		<input type="checkbox"/>	
	Pre-school	<input type="checkbox"/>	Primary	<input type="checkbox"/>	Lower Secondary	<input type="checkbox"/>	Upper Secondary	<input type="checkbox"/>	Vocatio- nal	<input type="checkbox"/>
<b>4</b>	<b>Current employment status (if not at school)</b>									
	Full time job	<input type="checkbox"/>	Part time job	<input type="checkbox"/>	Student	<input type="checkbox"/>	Unemployed	<input type="checkbox"/>	Retired	<input type="checkbox"/>
	Please describe your current job (or last full time job if not currently working):									

**Table 7:** User Self Administered Questionnaire (SAQ) – Example 1: Both Generations

<b>5</b>	<b>Education and Training History</b>		
	Not Completed Compulsory Education		<input type="checkbox"/>
	Completed Compulsory Education		<input type="checkbox"/>
	Higher Education (College or University first degree)		<input type="checkbox"/>
	Postgraduate training		<input type="checkbox"/>
	Adult education course		<input type="checkbox"/>
<b>6</b>	<b>Qualifications</b>		
	None <input type="checkbox"/>	First Degree <input type="checkbox"/>	Secondary Education <input type="checkbox"/>
	Adult Education <input type="checkbox"/>	Apprenticeship <input type="checkbox"/>	Tertiary Education / Postgraduate Degree / Diploma / PhD <input type="checkbox"/>
	Other (please specify):		
<b>7</b>	<b>How would you describe your ethnic background?</b>		
<input type="checkbox"/>	White	<input type="checkbox"/>	Black – Caribbean
<input type="checkbox"/>	Black – Other	<input type="checkbox"/>	Indian
<input type="checkbox"/>	Bangladeshi	<input type="checkbox"/>	Chinese
<input type="checkbox"/>		<input type="checkbox"/>	Black - African
<input type="checkbox"/>		<input type="checkbox"/>	Pakistani
<input type="checkbox"/>		<input type="checkbox"/>	Any other ethnic group

**SECTION B: Background to your involvement in the learning activity**

In this section, we would like to find out about how and why you participate in this activity.

<b>1</b>	<b>How long ago was it when you first started getting involved in this activity?</b> <i>(Please tick one box.)</i>		
	First time now <input type="checkbox"/>	In the last 6 months <input type="checkbox"/>	6 months - 1 year <input type="checkbox"/>
	1-3 years <input type="checkbox"/>	Over 3 years <input type="checkbox"/>	
<b>2</b>	<b>Why did you first get involved in this activity?</b> <i>(Please tick all the boxes that apply.)</i>		
	For fun/something to do <input type="checkbox"/>	I just happened to be there and joined in <input type="checkbox"/>	
	Went along with a friend/relative <input type="checkbox"/>	To improve my knowledge <input type="checkbox"/>	
	To improve my qualifications <input type="checkbox"/>	To help me get promotion or a better job <input type="checkbox"/>	
	To get to know other people <input type="checkbox"/>	To work with the other generation <input type="checkbox"/>	
	Other (please write in):		
<b>3</b>	<b>How often do you participate in this particular activity?</b> <i>(Please tick one box.)</i>		
	Once a week <input type="checkbox"/>	More than once a week <input type="checkbox"/>	
	About once a month <input type="checkbox"/>	Less than once a month <input type="checkbox"/>	
<b>4</b>	<b>And how long have you been doing this activity?</b> <i>(Please tick one box.)</i>		
	First time now <input type="checkbox"/>	About three months <input type="checkbox"/>	6 months- 1 year <input type="checkbox"/>

**Table 7:** User Self Administered Questionnaire (SAQ) – Example 1: Both Generations (cont.)



**SECTION C: Benefits of involvement**

In this section we are interested in what you get out of participating in this activity.

<b>1</b>	<p><b>Below is a list of benefits people have said they have gained as a result of getting involved in activities like this one.</b>  <i>(For each item, please circle the number which applies in your case. For example, if you strongly agree that participating in this activity has improved your general knowledge, you would circle the number +2. If you strongly disagree you would circle the number -2. If you neither agree nor disagree or have no opinion, you would circle the number 0.)</i></p>					
	Improved your self-confidence	-2	-1	0	+1	+2
	Helped you to meet people and make new friends	-2	-1	0	+1	+2
	Gained a better understanding of the other generation	-2	-1	0	+1	+2
	Helped you to do more complex things (e.g social networking)	-2	-1	0	+1	+2
	Helped you to develop networks that provide opportunities	-2	-1	0	+1	+2
	Made you feel more involved in your neighbourhood	-2	-1	0	+1	+2
	Improved your general knowledge	-2	-1	0	+1	+2
	Improved your writing or reading skills	-2	-1	0	+1	+2
	Improved your knowledge about particular subjects	-2	-1	0	+1	+2
	Improved your basic computer skills	-2	-1	0	+1	+2
	Improved your computer and Internet (Web 2.0) skills	-2	-1	0	+1	+2
	Improved your organisational / managerial skills	-2	-1	0	+1	+2
	Improved your professional qualifications	-2	-1	0	+1	+2
	Contributed to improving your job prospects	-2	-1	0	+1	+2
<b>2</b>	<p><b>As a result of your involvement in (this activity), have you done any of the following things?</b>  <i>(Please tick all the boxes that apply.)</i></p>					
	Made any changes to your job or career? <i>(Please specify)</i>					
	Get more involved locally / regionally to meet or work with people? <i>(Please specify)</i>					
	Got more involved in using computers to meet or work with people (e.g. using Facebook, LinkedIn)? <i>(Please specify)</i>					
<b>3</b>	<p><b>What have been the most positive aspects of getting involved in this activity?</b> <i>(Please specify)</i></p>					
<b>4</b>	<p><b>What, if any, have been problems experienced or things you have not liked and could be improved?</b> <i>(Please specify)</i></p>					
<b>5</b>	<p><b>Is there anything else you feel you have achieved as a result of participating in this activity?</b>  <i>(Please specify)</i></p>					

**Table 7:** User Self Administered Questionnaire (SAQ) – Example 1: Both Generations (cont.)

**Example 2: SAQ Older People**

SAQ Ref no: (Office use only)

1. Age Range	50-60 years <input type="checkbox"/>	61-70 years <input type="checkbox"/>	71+ years <input type="checkbox"/>
2. Have you ever been involved in intergenerational activities?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
3. If yes, what was your experience?			
4. If not, what stopped you from getting engaged?			
PERSONAL DEVELOPMENT			
To what extent do you agree/disagree with the following statements after being involved in the Big Foot Activity? <i>(please tick one box only for each statement)</i>			
5. I feel much more confident	① - ② - ③ - ④ - ⑤ Strongly disagree - Strongly agree	Not sure <input type="checkbox"/>	
6. I understand younger people better	① - ② - ③ - ④ - ⑤ Strongly disagree - Strongly agree	Not sure <input type="checkbox"/>	
7. I have more respect for younger people	① - ② - ③ - ④ - ⑤ Strongly disagree - Strongly agree	Not sure <input type="checkbox"/>	
8. I get on better with younger people	① - ② - ③ - ④ - ⑤ Strongly disagree - Strongly agree	Not sure <input type="checkbox"/>	
9. I get on better with people from different backgrounds <i>(for example those that are richer/poorer, from a different race/religion, or a different nationality)</i>	① - ② - ③ - ④ - ⑤ Strongly disagree - Strongly agree	Not sure <input type="checkbox"/>	
10. My communication skills have improved	① - ② - ③ - ④ - ⑤ Strongly disagree - Strongly agree	Not sure <input type="checkbox"/>	
HEALTH & WELLBEING			
As a result of being involved in the Big Foot Activity .... <i>(please tick one box only for each statement)</i>			
11. My health and wellbeing has improved	① - ② - ③ - ④ - ⑤ Strongly disagree - Strongly agree	Not sure <input type="checkbox"/>	
12. I am now more active	① - ② - ③ - ④ - ⑤ Strongly disagree - Strongly agree	Not sure <input type="checkbox"/>	

**Table 8:** User Self Administered Questionnaire (SAQ) – Example 2: Older People

HEALTH & WELLBEING (cont.)							
13. My general fitness has improved		① - ② - ③ - ④ - ⑤ Strongly disagree - Strongly agree			Not sure <input type="checkbox"/>		
14. I am now more social		① - ② - ③ - ④ - ⑤ Strongly disagree - Strongly agree			Not sure <input type="checkbox"/>		
SKILLS & LEARNING							
15. Have you learnt anything after this project?		Yes <input type="checkbox"/>	No <input type="checkbox"/>	Not sure <input type="checkbox"/>			
16. If yes, what have you learnt?		Better understanding  <input type="checkbox"/>	New skills  <input type="checkbox"/>	Being more creative  <input type="checkbox"/>	Changed attitude  <input type="checkbox"/>	Being more active  <input type="checkbox"/>	Other <i>(Please specify below)</i>  <input type="checkbox"/>
Please explain:							
SOCIAL & COMMUNITY ACTIVITIES							
As a result of being involved in the Big Foot Activity .... <i>(please tick one box only for each statement)</i>							
17. Are you now planning to get involved in activities in your community? <i>(e.g. join community centre activities, take part in sports, do more voluntary work)</i>		Yes <input type="checkbox"/>	No <input type="checkbox"/>	Not sure <input type="checkbox"/>			
18. Are you now planning to take part in more cultural activities? <i>(e.g. visit museums, go to the theatre, visit local festivals)</i>		Yes <input type="checkbox"/>	No <input type="checkbox"/>	Not sure <input type="checkbox"/>			

**Table 8:** User Self Administered Questionnaire (SAQ) – Example 2: Older People (cont.)

The local area where the Big Foot Activity took place ...				
19. Has this project had a positive upon the local area?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Not sure <input type="checkbox"/>	
20. Are you more satisfied with the local area?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Not sure <input type="checkbox"/>	
21. What impact do you think this project has had on Anti-Social Behaviour (ASB)?	Reduced ASB  <input type="checkbox"/>	Stayed the same  <input type="checkbox"/>	Increased ASB  <input type="checkbox"/>	ASB is not a problem in the area  <input type="checkbox"/>
The Future ...				
22. Would you participate in an intergenerational learning initiative again?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Not sure <input type="checkbox"/>	
If not, why not?				
23. Do you think you now have more opportunities to get involved in other projects?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Not sure <input type="checkbox"/>	
24. Did you experience any problems in the project?	Yes <input type="checkbox"/>	No <input type="checkbox"/>		
If so, what were these problems?				
25. If there is one thing you could change in the activity, what would that be?				
26. General comments:				

**Table 8:** User Self Administered Questionnaire (SAQ) – Example 2: Older People (cont.)

**Example 3: SAQ Younger People**

SAQ Ref no: (Office use only)

1. Age Range	05-10 years <input type="checkbox"/>	11-16 years <input type="checkbox"/>	17-25 years <input type="checkbox"/>			
2. Have you ever been involved in intergenerational activities?	Yes <input type="checkbox"/>		No <input type="checkbox"/>			
3. If yes, what was your experience?						
4. If not, what stopped you from getting engaged?						
<b>PERSONAL DEVELOPMENT</b>						
5. I feel much more confident	① - ② - ③ - ④ - ⑤ Strongly disagree - Strongly agree		Not sure <input type="checkbox"/>			
6. I understand older people better	① - ② - ③ - ④ - ⑤ Strongly disagree - Strongly agree		Not sure <input type="checkbox"/>			
7. I have more respect for older people	① - ② - ③ - ④ - ⑤ Strongly disagree - Strongly agree		Not sure <input type="checkbox"/>			
8. I get on better with older people	① - ② - ③ - ④ - ⑤ Strongly disagree - Strongly agree		Not sure <input type="checkbox"/>			
9. I get on better with people from different backgrounds ( <i>for example those that are richer/poorer, from a different race/religion, or a different nationality</i> )	① - ② - ③ - ④ - ⑤ Strongly disagree - Strongly agree		Not sure <input type="checkbox"/>			
10. My communication skills have improved	① - ② - ③ - ④ - ⑤ Strongly disagree - Strongly agree		Not sure <input type="checkbox"/>			
<b>SKILLS &amp; LEARNING</b>						
11. Have you learnt anything after this project?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Not sure <input type="checkbox"/>			
12. If yes, what have you learnt?	Better understanding <input type="checkbox"/>	New skills <input type="checkbox"/>	Being more creative <input type="checkbox"/>	Changed attitude <input type="checkbox"/>	Being more active <input type="checkbox"/>	Other ( <i>Please specify below</i> ) <input type="checkbox"/>
Please explain:						

**Table 9:** User Self Administered Questionnaire (SAQ) – Example 3: Younger People

SKILLS & LEARNING (cont.)				
13. Are you currently involved in education or training?	Yes <input type="checkbox"/>	No <input type="checkbox"/>		
14. If not, will you now do some educational activity?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Not sure <input type="checkbox"/>	
SOCIAL & COMMUNITY ACTIVITIES				
As a result of being involved in the Big Foot Activity .... <i>(please tick one box only for each statement)</i>				
15. Are you now planning to get involved in activities in your community? <i>(e.g. join community centre activities, take part in sports, do more voluntary work)</i>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Not sure <input type="checkbox"/>	
16. Are you now planning to take part in more cultural activities? <i>(e.g. visit museums, go to the theatre, visit local festivals)</i>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Not sure <input type="checkbox"/>	
17. Has this project had a positive upon the local area?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Not sure <input type="checkbox"/>	
18. Are you more satisfied with the local area?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Not sure <input type="checkbox"/>	
19. Do you have any concerns about Anti-Social Behaviour (ASB)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Not sure <input type="checkbox"/>	
If so, what are these concerns?				
20. What impact do you think this project has had on Anti-Social Behaviour (ASB)?	Reduced ASB <input type="checkbox"/>	Stayed the same <input type="checkbox"/>	Increased ASB <input type="checkbox"/>	ASB is not a problem in the area <input type="checkbox"/>

**Table 9:** User Self Administered Questionnaire (SAQ) – Example 3: Younger People (cont.)

The Future ...			
21. Would you participate in an intergenerational learning initiative again?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Not sure <input type="checkbox"/>
If not, why not?			
22. Do you think you now have more opportunities to get involved in other projects?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Not sure <input type="checkbox"/>
23. Did you experience any problems in the project?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
If so, what were these problems?			
24. If there is one thing you could change in the activity, what would that be?			
25. General comments:			

**Table 9:** User Self Administered Questionnaire (SAQ) – Example 3: Younger People (cont.)

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Notes:



## 7.4 User Focus Group Guidelines

### INTRODUCTION

As part of the experimental approach, we are using focus groups with participants and/or other stakeholders who are closely involved in the Intergenerational Activities being studied. Focus Groups can be thought of as face-to-face interviews with people who have experience with and/or knowledge about Intergenerational Learning. In this case, the purposes of the Focus Group are:

- To deepen understandings about what the case does and how it operates;
- To get information about user experiences of being involved in the initiative;
- To find out about the outcomes and impacts of being involved.

All information provided in this interview will be anonymised.

### Focus Group Overview

#### Who should be involved in the Focus groups?

A representative sample of the 'target' audience: in this case learners / end-users for whom the intergenerational activity is providing learning. This sample needs to reflect the characteristics of the people involved in the activity and may include as well external stakeholders. Strictly speaking, different user groups should be separated in order that their views do not get 'tainted', or in situations where one group could feel constrained in making observations that may be controversial in the face of others' (for example learners with instructors; teachers and case managers). However, time and resources may require a pragmatic approach in which one focus group is carried out with representatives of all stakeholders combined.

#### How many people to include in the focus group?

A good rule of thumb is a maximum of around ten people per group.

#### Focus Group Interviews: how to run them

The group discussion is 'focused' or structured by a 'facilitator' and there should in addition be present one or two additional observers or recorders to gather data on the outputs of the discussion. Tape recordings of the discussion will assist in subsequent analysis of the data, but there is a trade off in using tape recorders in terms of confidentiality and respondent resistance. Transcription and analysis of tapes is also very resource-intensive and time-consuming. The main purpose of this focus group is to elicit the experiences of a representative sample of different stakeholders involved in the activity. Typically this would involve a group of learners, but might include a group of training providers as well. The Focus Group Discussions usually takes the form of a five stage process.

#### *Stage 1: Introduction to the purposes of the group discussion.*

Briefly describe the project and what its objectives are.

State the purposes of the Focus Group – to get participants' views on their experiences.

Establish ground rules: everyone will be asked to talk; each person's opinion counts; participants should not interrupt each other.

*Stage 2: Gather data on the characteristics of the focus groups.*

Ask the participants to provide brief information on demographic and socio-cultural characteristics (e.g. age, gender, job description; educational qualifications)

*Stage 3: Establish the experiences of the group before getting involved in this activity, and their reasons for getting involved.*

Prompts:           What made this particular activity attractive?  
                          What were the expectations about getting involved?

*Stage 4: Establish the experiences of the group in relation to involvement in this activity*

This is the main data-gathering phase. In it, a series of 'focused questions' are posed. For each question, the procedures should be as follows:

- Facilitator writes down question on white board/flip chart.
- Participants are given a few moments to write down initial responses to the question.
- Facilitator asks each participant to present their answer in turn. Facilitator writes down on flip chart each response, noting major similarities and differences in questions.
- Facilitator leads group discussion about responses.
- Facilitator summarises group discussion, highlighting group agreements and disagreements.
- Focus group discussion unpicks in more detail the major agreements and disagreements.

Suggested focus group questions are as follows:

**Question 1: Experiences of involvement in the activity**

- What intergenerational learning is carried out?
- Which age groups are involved in the learning?
- How is the learning organised (e.g. learning methods)?
- What was actually learned?
- Were any problems experienced?
- How are Web 2.0 tools used? How do Web 2.0 tools enable learners to work with each other and with other actors?

**Question 2: Outcomes and impacts**

- What would you say was the main type of learning benefit for learners?
- In what ways did it contribute to their personal development (e.g. raise their confidence; increase intergenerational understanding; better involvement in the local community)?
- In what ways did the activity improve the skills and competences of participants (e.g. 'soft' skills like intergenerational solidarity; citizenship; self-esteem; ICT skills; operational / managerial skills)?
- In what ways would you say the activity has an impact beyond the individual (e.g. contributing to local community development; regional re-generation; inclusion of remote / mountainous regions: increasing social capital)?
- Were technical problems experienced in using Web 2.0 tools? Did the use of Web 2.0 tools create any other problems in relation to interactions between users and other actors e.g. between learners and 'instructors'?

- Has the activity had any unforeseen or any undesired outcomes?
- Has it led to other things than originally intended?

**Question 3: Improvements**

- In what ways do you think this initiative could be improved?
- Are there plans for further developing the project once funding has ended?

*Stage 5: Summary and close-down*

Facilitator summarises the main conclusions for each question.

Participants are invited to confirm, make adjustments or add to the conclusions.

Thanks participants and closes meeting.

Allow opportunity for anyone interested to obtain results of evaluation.

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## 7.5 Observation Guidelines

This schedule is to be used to record the process and outcomes of direct observation of a learning activity. The medium is free text, but is structured in terms of a number of key dimensions. Data collection should combine both your own observation of the event together with the observations of those taking part, so it is important to ask participants questions about why they are doing something, what they get out of it and so on.

### Setting, Boundaries and Learning Arrangements

*Description of the environment in which learning takes place*

(e.g. school; community college; housing estate; museum; open setting).

*Socio-cultural characteristics of the environment*

(e.g. community-based; 'rich' neighbourhood/poor neighbourhood; housing estate; rural community)

*Characteristics of participants*

- Number involved in this observed activity;
- Gender distribution;
- Age ranges of the young and elderly participants;
- Broad socio-cultural characteristics (e.g. socio-economic status; ethnicity);
- Special target groups? (e.g. long term unemployed);
- Existing skills levels/qualifications.

*Pedagogic arrangements/approaches*

- Describe the type of intergenerational learning that is taking place;
- Describe how interaction between the participants is organised;
- Describe the approach used (e.g. traditional didactic –teacher/student; participatory; tutoring; mentoring);
- Who is mediating or providing learning (e.g. professional instructors; people from the community)?
- What learning materials/tools/support are used (e.g. conventional texts; on-the-job; role playing; collaborative work)?
- What are the main aims and objectives of the activity (e.g. to teach skills; have fun)?
- How are participants encouraged to participate?
- How often does this activity take place (e.g. uniquely; at certain intervals; daily)?
- Describe what Web 2.0 tools are being used; what for and how they are being used.

### Description of the activity

Record your observations of the activity. This should include:

- Over what period the activity was observed?
- The main 'critical incidents' (What were the starting conditions? How did it end? Any particular events or incidents that were unusual)?
- Observed modes of interaction and collaboration – how do participants collaborate?
- Any tensions, problems that occurred - what are the main barriers and obstacles to intergenerational exchange and learning?

- What examples of innovative practices could be identified (e.g. ways of overcoming inhibitions to learning or resistance towards the other generation; ways of delivering learning; participation and collaboration)?
- What specific arrangements or strategies are used to promote intergenerational understanding?

#### Outcomes

- In what ways did the participants benefit from their learning activity?
- What were the specific learning outcomes? What did they think they learned?
- How useful was the activity and in what ways was it useful (e.g. for own self-esteem; for intergenerational understanding; improved social life; contribution to and integration into the local community; future job and career strategies)?
- Is there any evaluation available of the learning outcomes of the activity?
- What do the participants themselves feel they get out of the activity?

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Notes:

## 7.6 Content Analysis Checklist

For the intergenerational activities, mainly four types of content could be envisaged:

- Learning outputs (e.g. products; educational and training content; Web 2.0 content e.g. video, audio, pictures; exhibition/installation materials; artefacts);
- Organisational material (e.g. evaluation reports; project management reports; key deliverables);
- Interviews and focus group discussions;
- Promotional media (e.g. web sites; brochures; promotional literature).

In a nutshell, content analysis of this material is aimed at scanning the material to find examples that will enable the project to answer its pre-/self-defined research questions. This can be done basically in two ways – manually, or by using software (either using MS-WORD © and then searching the text for key words; or using a specialist content analysis software package like NVivo © ).

Manual content analysis works normally like as follows:

- Scan the material to look for examples of expressions that are of interest, using a checklist of ‘constructs’;
- Record the examples of constructs as they appear under different category headings or ‘codes’. Examples of the kinds of categories and codes are shown in the checklist below;
- Go back to the list of codes, and then try to cluster them, putting together codes that are similar, so you end up with a smaller list of codes and examples that cover the spectrum of material;
- Count the frequency of occurrence of the different categories/code identified;
- Try to build up a picture of the interconnections between the different categories/codes – identifying where and how they link together.

A possible coding framework is shown in the Table below.

Questions	Constructs	Examples in Material	Codes	Frequency of Occurrence	Connections between Codes
‘Grand visions’ of intergenerational learning	<ul style="list-style-type: none"> <li>• Central focus</li> <li>• Theory of change</li> <li>• Intergenerational Learning model</li> </ul>				
Drivers shaping the visions – in terms of intergenerational and inclusion approaches, target scenarios and user needs	<ul style="list-style-type: none"> <li>• Intergenerational Needs</li> <li>• Inclusion Needs</li> <li>• Learning Needs</li> <li>• Target Strategy</li> </ul>				

**Table 10:** Content Analysis Checklist



Questions	Constructs	Examples in Material	Codes	Frequency of Occurrence	Connections between Codes
Pedagogical, organisational and technological choices	<ul style="list-style-type: none"> <li>• Inclusion model</li> <li>• Intergenerational Learning model</li> <li>• Delivery Model</li> <li>• Partnership Model</li> <li>• Organisational Modes</li> </ul>				
How are users involved in the implementation of these 'grand' visions and concrete approaches and what are the benefits for individual users, in terms of supporting intergenerational understanding; increasing social inclusion; developing skills and competences; supporting learning and labour market participation?	<ul style="list-style-type: none"> <li>• Collaboration Approach</li> <li>• Expected Intergenerational Learning Outcomes</li> <li>• Expected Inclusion Outcomes</li> <li>• Expected Skills and Competence Development Outcomes</li> <li>• Expected Participation Outcomes</li> </ul>				
What are the outcomes and impacts in terms of institutional and organisational change?	<ul style="list-style-type: none"> <li>• Changes in Organisation</li> <li>• Other Organisational Factors cited</li> </ul>				
What are the potential wider effects in terms of intergenerational and social inclusion?	<ul style="list-style-type: none"> <li>• Overall Outcomes and Impacts expected or identified</li> </ul>				
What problems have been encountered and how have they been addressed?	<ul style="list-style-type: none"> <li>• Technical problems</li> <li>• Organisational problems</li> <li>• Economic problems</li> <li>• Other Issues and Problems cited</li> </ul>				

**Table 10:** Content Analysis Checklist (cont.)

Questions	Constructs	Examples in Material	Codes	Frequency of Occurrence	Connections between Codes
What success factors and barriers can be identified in relation to outcomes and impacts?	<ul style="list-style-type: none"> <li>• Definition of Success</li> <li>• Definition of Barriers</li> <li>• What worked and what hasn't worked</li> <li>• Factors affecting Success</li> </ul>				
What good practices can be transferred / recommendations to be drafted to support future practice and policy in this field?	<ul style="list-style-type: none"> <li>• Good practice Examples cited</li> <li>• Recommendations formulated</li> <li>• Dissemination Activities</li> <li>• Evaluation results</li> </ul>				

**Table 10:** Content Analysis Checklist (cont.)

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Notes:

## 7.7 Automated Data Collection Guidelines

As many intergenerational activities will involve the use of Web 2.0 applications, another possible source for the data collection will be information generated automatically e.g. through project websites and the online representations of these activities. The kinds of material that could be collected in the case studies are likely to cover:

- Utilisation data – e.g. number of users; file requests; visits; pages accessed; duration of sessions; site categories visited;
- Content production – e.g. number and type of blogs produced; expansion of wiki content; videos produced etc;
- Profiling – e.g. type of user involved in social networking;
- Collaboration and networking – e.g. number and type of interactions engaged in by users.

Data collection will depend on the nature of this material. For material like utilisation data, it is useful to obtain both 'secondary' data – e.g. reports generated by the system itself and 'primary' data – e.g. time series data in excel or other spreadsheet form that can be analysed later to assess things like whether utilisation of the system has increased or decreased over a given period. When assessing things like what content is produced, it is useful to collect a sample of content being produced by users – e.g. through blogs and wikis, and then analyse it using content analysis (see Section 5.7). Data collection should cover the following elements:

### Volume and Profile of Users

- Number;
- Age range;
- Demographics (e.g. gender; ethnicity; country of origin);
- Educational level;
- Visitors.

### Utilisation of System

- Tools used;
- Data on frequency of use (e.g. how many times per week/hours per session);
- Duration of sessions;
- Content categories visited - which categories?
- Page visits and downloads.

### Data on Technical Functionalities

- Speed of access of Web 2.0 and other tools;
- Technical effectiveness – frequency of crashes and technical problems;
- Comprehensiveness of functionalities – what was missing?
- Any data on usability and user friendliness.

### Content

- Types and categories of content produced;
- Access and use by users;
- Characteristics of content produced;
- Data on degree and nature of collaboration.

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Notes:

## 7.8 Behavioural Additionality Analysis

The main objective of behavioural additionality analyses is to estimate both individual and aggregate changes in learning and social interaction behaviours associated with participation in the activity. The analysis approach combines both quantitative data analysis (e.g. from self-reported responses to the user questionnaires) with qualitative data analysis (e.g. from interviews and focus groups).

The template below is divided into four key additionality dimensions that reflect the changes that can be associated with participation in intergenerational learning initiatives i.e. learning itself; intergenerational understanding; skills and competence development; employability and career perspectives; personal capacity. Each dimension is sub-divided into a range of additionality factors that need to be assessed. For each factor, summarise the results of the data collection activities as follows:

- *Quantitative evidence* – drawing on the results of the SAQ survey; together with any other statistical information gained from: evaluation reports; key informant interviews; other materials, provide measures of the changes resulting e.g. in basic numeracy; general knowledge etc. Provide clear evidence – e.g. % users ‘strongly agreeing’ the initiative had improved their literacy and numeracy.
- *Qualitative evidence* – provide examples of changes identified by the study on changes associated with participation – from interviews, focus groups etc.
- *Additionality estimate* – on the basis of the evidence, provide an interpretative assessment of the degree of change for each factor, as follows:

- 2 *evidence suggests change has been significantly negative*
- 1 *evidence suggests change has been negative*
- 0 *evidence suggests no change identifiable*
- +1 *evidence suggests change has been positive*
- +2 *evidence suggests change has been significantly positive*

LEARNING			
Additionality Factor	Quantitative Evidence	Qualitative Evidence	Additionality Estimate
General knowledge			
Specific subjects			
Further learning (e.g. re-engaging in education)			
Other ( <i>Please specify</i> )			

**Table 11:** Behavioural Additionality Analysis

<b>SKILLS &amp; COMPETENCES<sup>3</sup></b>			
Intergenerational understanding			
Social and civic competences			
Sense of initiative and entrepreneurship			
Learning to learn			
Digital competence			
Communication in the mother tongue			
Communication in foreign languages			
Mathematical competence and basic competences in science and technology			
<b>LABOUR MARKET</b>			
Improved qualifications			
Improved job prospects and careers perspectives			
Improved job opportunities			
Other ( <i>Please specify</i> )			
<b>PERSONAL CAPACITY</b>			
Self-confidence / self-esteem			
Social interaction / engagement			
Networking			
Citizenship			
Other ( <i>Please specify</i> )			

**Table 11:** Behavioural Additionality Analysis (cont.)

<sup>3</sup> Based on the Framework on 'Key Competences for Lifelong Learning' of the European Commission; URL: [http://europa.eu/legislation\\_summaries/education\\_training\\_youth/lifelong\\_learning/c11090\\_en.htm](http://europa.eu/legislation_summaries/education_training_youth/lifelong_learning/c11090_en.htm)

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Notes:



## 7.9 Data Synthesis

### Profile of the Activity

Use this template to develop a profile of the activity, drawing on available information (from initial case appraisal; from the website and other available material; from interviews with key informants, from focus groups etc) to develop the initial profile, and then adding to it as the data collection and analysis proceeds.

SECTION A				
1. Overall Description				
Name	Countries covered	User groups, age range and number of users	Learning sector (school; higher; adult etc)	Learning scenario (on-line; school-based; work etc)
Brief summary of case (what it aims to do)				
How is activity funded		Data on costs/cost effectiveness		
Duration of activity and current status		Stakeholders/partners involved		
2. Innovation Features				
Intergenerational	Pedagogical	Organisational	Economical	Social
Brief summary of why this case is innovative				
3. Intergenerational Learning Features				
Learning approach/model (e.g. blended; transmissive; constructivist)	Learning scenario (how is learning delivered)	Learning content	Intended learning outcomes	Learner engagement (e.g. generations, tutors; mentors)

**Table 12:** Profile of the Activity

<b>4. Skills &amp; Competence Focus</b>				
'Soft Skills' (e.g. intergenerational understanding, citizenship) taught	Labour Market Skills thought	Conventional Digital Skills taught	Innovative Digital Skills taught	Technical/transferable skills taught
<b>5. Technology Features</b>				
Delivery Platform	Web 2.0 Tools used	Non Web 2.0 tools used	Learning Technologies	Collaboration Tools
Brief summary of distinguishing technological features				
<b>6. Web 2.0 Features</b>				
How is Web 2.0 used to support learning?	How is collaboration supported?	What kind of collaborative learning happens?	What role does user play in collaboration?	What outputs are produced by collaboration?
<b>7. Learning Outcomes</b>				
What outputs are produced?	What learning outcomes can be identified?	What impacts on individuals can be identified?	What wider impacts can be identified (e.g. on community; social capital)?	What unforeseen/negative impacts can be identified?
<b>8. Intergenerational &amp; Inclusion Scenarios</b>				
Groups targeted	Exclusion aspects addressed	Intergenerational and inclusion objectives	Intergenerational and inclusion scenario (how users are engaged)	How Web 2.0 used to promote intergenerational learning and social inclusion
Brief summary of how initiative promotes intergenerational inclusion				

**Table 12:** Profile of the Activity (cont.)

9. Intergenerational & Inclusion Outcomes				
What specific outputs are produced to support intergenerational learning and social inclusion?	What intergenerational and social inclusion outcomes can be identified?	What impacts on individuals and groups can be identified?	What wider impacts can be identified (e.g. on community; social capital)?	What unforeseen/negative impacts can be identified?

**Table 12:** Profile of the Activity (cont.)

### Summary of the Activity

This template provides a framework for analysis and synthesis of the data gathered during the activity to combine the results of all the data collected to answer key research questions concerning Intergenerational Learning. Use the template to provide evidence for your summary, including any statistical data gathered (e.g. for example number of beneficiaries) and quotations from participants to illustrate your conclusions.

Research Questions	Sub-Questions	Conclusions & Evidence	Evidence Source
What does the Intergenerational Learning landscape in remote / mountainous areas look like?	What are the regional ‘grand visions’ of intergenerational learning for social inclusion and regional re-generation?		<ul style="list-style-type: none"> <li>○ Participatory Mapping</li> <li>○ Key Informant Interviews</li> <li>○ Focus Groups</li> <li>○ Content Analysis</li> <li>○ Behavioural Additionality Analysis</li> </ul>
	What drivers are shaping the visions – in terms of inclusion approaches, target scenarios and user needs?		
	How are these visions and scenarios put into practice – in terms of technical, pedagogic and organisational choices?		
What are the outcomes and impacts associated with the use of Intergenerational Learning?	How are users involved in the implementation of these visions and approaches and what are the benefits for individual and groups of users, in terms of supporting inclusion; developing skills and competences; employability and personal capacity?		<ul style="list-style-type: none"> <li>○ Key Informant Interviews</li> <li>○ Self-Administered Questionnaires</li> <li>○ Focus Groups</li> <li>○ Observations</li> <li>○ Automated Data Collection</li> </ul>
	What are the outcomes and impacts in terms of institutional and organisational change?		
	What are the potential wider effects in terms of intergenerational solidarity, social inclusion and regional re-generation?		

**Table 13:** Summary of the Activity

Research Questions	Sub-Questions	Conclusions & Evidence	Evidence Source
What can be learned from the use of Intergenerational Learning?	What problems have been encountered and how have they been addressed?		<ul style="list-style-type: none"> <li>○ Participant’s Feedback</li> <li>○ Key Informant Interviews</li> </ul>
	What success factors and what barriers can be identified in relation to outcomes and impacts?		<ul style="list-style-type: none"> <li>○ Self-Administered Questionnaires</li> <li>○ Focus Groups</li> <li>○ Observations</li> </ul>
	What good practices can be transferred and recommendations drafted to support future practice and policy in this field?		<ul style="list-style-type: none"> <li>○ Content Analysis</li> <li>○ Automated Data Collection</li> <li>○ Behavioural Additionality Analysis</li> </ul>

**Table 13:** Summary of the Activity (cont.)

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*Notes:*

## Annex I: Sources & Further Reading

Almeida Pinto, T. (Ed.) (2009). Guide of Ideas for Planning and Implementing Intergenerational Projects. Together: yesterday, today and tomorrow. MATES Consortium & Association VIDA: Lisbon; URL: [http://www.matesproject.eu/GUIDE\\_21\\_versions/English.pdf](http://www.matesproject.eu/GUIDE_21_versions/English.pdf); (last retrieved 02 July 2012)

Bernard, M. & Ellis, W.E. (2004). How Do You Know That Intergenerational Practice Works? A guide to getting started on evaluating Intergenerational Practice'; Beth-Johnson-Foundation (BJF): Stoke-on-Trent; URL: <http://www.centreforip.org.uk/res/documents/publication/How%20do%20you%20know%20that%20Intergenerational%20practice%20works.pdf>; (last retrieved 02 July 2012)

Beth Johnson Foundation (2008). Approved Provider Standard Guidance Notes for Organisations Providing Intergenerational Projects or Programmes; Centre for Intergenerational Practice (CIP) and the Beth-Johnson-Foundation (BJF): Stoke-on-Trent; URL: <http://www.centreforip.org.uk/resources/approved-provider-standard>; (last retrieved 02 July 2012)

Beth Johnson Foundation (2009). Evaluating Intergenerational Projects: A Practical Guide to Useful Resources. Beth-Johnson-Foundation (BJF): Stoke-on-Trent; URL: [http://www.centreforip.org.uk/res/documents/publication/Evaluating%20Intergenerational%20Projects\\_Practical%20Guide%20to%20Resources.pdf](http://www.centreforip.org.uk/res/documents/publication/Evaluating%20Intergenerational%20Projects_Practical%20Guide%20to%20Resources.pdf); (last retrieved 02 July 2012)

Beth Johnson Foundation (2011). A Guide to Intergenerational Practice; Beth-Johnson-Foundation (BJF): Stoke-on-Trent; URL: <http://www.centreforip.org.uk/res/documents/page/BJFGuidetoIPV2%20%2028%20Mar%202011.pdf>; (last retrieved 02 July 2012)

Boström, A.-K. (2003). Lifelong Learning, Intergenerational Learning, and Social Capital. Stockholm: Institute of International Education, Stockholm University

EAGLE Consortium (2008). Intergenerational Learning in Europe. Policies, Programmes and Practical Guidance; ; EAGLE Consortium & Innovation in Learning Institute (ILI), Friedrich-Alexander-Universität Erlangen-Nürnberg: Erlangen; URL: <http://www.eagle-project.eu/welcome-to-eagle/final-report.pdf/view>; (last retrieved 02 July 2012)

EAGLE Consortium (2008). The EAGLE Toolkit for Intergenerational Activities; EAGLE Consortium & Innovation in Learning Institute (ILI), Friedrich-Alexander-Universität Erlangen-Nürnberg: Erlangen; URL: [http://www.eagle-project.eu/welcome-to-eagle/the-eagle-toolkit-for-intergenerational-activities/FINAL\\_FINAL\\_eagle\\_toolkit\\_final\\_dtp.pdf](http://www.eagle-project.eu/welcome-to-eagle/the-eagle-toolkit-for-intergenerational-activities/FINAL_FINAL_eagle_toolkit_final_dtp.pdf); (last retrieved 02 July 2012)

Kolland, F. (2008): What is inter-generational learning in a higher education setting? In: Waxenegger, A. on behalf of the Adding Quality to Life through Inter-Generational Learning via Universities (ADD LIFE) Consortium (Ed.): The ADD LIFE European Tool Kit for Developing Inter-generational Learning in Higher Education, Graz; URL: [http://www.uni-graz.at/add-life\\_toolkit\\_en.pdf](http://www.uni-graz.at/add-life_toolkit_en.pdf); (last retrieved 02 July 2012)

Links-up Consortium (2010). Methodology Report & Case Study Toolkit; Links-up Consortium & Innovation in Learning Institute (ILI), Friedrich-Alexander-Universität Erlangen-Nürnberg: Erlangen; confidential Deliverable available upon request from [thomas.fischer@menon.org.gr](mailto:thomas.fischer@menon.org.gr)

Luton Culture (2011). Generations Together. Evaluation Report. Luton City Council & Department for Education (DfE): Luton; URL: <http://www.centreforip.org.uk/res/documents/page/GT%20Report.pdf>; (last retrieved 02 July 2012)

Luton Culture (2011). Generations Together. Summary Report. Luton City Council & Department for Education (DfE): Luton; URL: <http://www.centreforip.org.uk/res/documents/page/GT%20Summary%20Report.pdf> ; (last retrieved 02 July 2012)

Manchester City Council (2011): Manchester's Intergenerational Practice Toolkit. Creating Connections, Breaking Down Barriers'; Manchester City Council: Manchester; URL: [http://www.manchester.gov.uk/info/100003/communities\\_and\\_neighbourhoods/4575/manchesters\\_generations\\_together\\_programme\\_2009-2011/1](http://www.manchester.gov.uk/info/100003/communities_and_neighbourhoods/4575/manchesters_generations_together_programme_2009-2011/1); (last retrieved 02 July 2012)

Rhondda Cynon Taf (RCT) County Borough Council (2008). Engagement – A Strategic Review of Intergenerational School Projects within Rhondda Cynon Taf. Rhondda Cynon Taf (RCT) County Borough Council: Tonypany; URL: <http://www.ccip.org.uk/Libraries/Local/949/Docs/Wales/ISP%20Strategic%20Review%20-%20Final.pdf>; (last retrieved 02 July 2012)

Rhondda Cynon Taf (RCT) County Borough Council (2008). Tool-kit for Intergenerational School Projects; Rhondda Cynon Taf (RCT) County Borough Council: Tonypany; URL: <http://www.ccip.org.uk/Libraries/Local/949/Docs/Themed%20pages%20-%20Mentoring/RCT%20Toolkit.doc>; (last retrieved 02 July 2012)

University of Wales (2008): Lampeter Certificate in Intergenerational Practice. Department of Voluntary Sector Studies, University of Wales, Trinity Saint David: Lampeter; URL: <http://www.volstudy.ac.uk/Intergen/>; (last retrieved 02 July 2012)

More resources can be found at the websites of EMIL ([www.emil-network.eu](http://www.emil-network.eu)) and the Centre for Intergenerational Practice ([www.centreforip.org.uk](http://www.centreforip.org.uk)) hosted by the Beth-Johnson-Foundation (<http://www.bjf.org.uk>). The national members are also acting as National Contact Points (NCPs) providing access to a rich resource bases of stakeholders and relevant publications in national languages.



## Annex II: Screening Questionnaire for Intergenerational Experiments

DESCRIPTOR	DETAILS
Author/institution	
Name of the experiment	
<p>Rationale and description of the experiment</p> <p><i>(Please take the following questions – where possible – into account and provide a summary description in continuous text.)</i></p> <p><i>(Please do not answer the questions separately.)</i></p> <p><i>Suggested length: 2 – 3 pages</i></p>	<ul style="list-style-type: none"> <li>• <i>Which kind of experiment you would like to implement?</i></li> </ul> <p>(paint a picture of what you will do on the basis that the reader knows nothing about it)</p> <ul style="list-style-type: none"> <li>• <i>What are aims and objectives of the experiment?</i></li> <li>• <i>What are the problems/needs addressed?</i></li> <li>• <i>What are the activities to reach the aims and objectives?</i></li> <li>• <i>How are participants encouraged/motivated to participate?</i></li> <li>• <i>Which pedagogical approach is used (e.g. traditional, participatory, action based, tutoring, mentoring)?</i></li> <li>• <i>What learning materials/tools/support are used (e.g. conventional texts or Internet based resources, simulations, role playing, excursions)?</i></li> <li>• <i>Are Information and Communication Technologies (ICTs) used and if yes, what types and how are they used?</i></li> <li>• <i>How is the interaction between the participants and/or facilitators/tutors organised?</i></li> <li>• <i>Who is mediating or providing learning (e.g. professional instructors; people from the community, peers, volunteers, mentors)?</i></li> <li>• <i>Why do you think this experiment is important for Big Foot?</i></li> <li>• <i>What you are aiming to achieve from the experiment and why you are doing it?</i></li> </ul> <p>(for example, what will success look like, what will be changed or developed, and what are you basing the need for this work on?)</p>

**Table 14:** Screening Questionnaire for Intergenerational Experiments

DESCRIPTOR	DETAILS
<p>Target / collaborating group(s) of the experiment</p> <p><i>(Please provide a short description and make reference – where possible – to age and gender distribution; cultural, residential, educational and economic status of the target group)</i></p> <p><i>Suggested length: 1 page</i></p>	<ul style="list-style-type: none"> <li>• Which are the specific target groups of the experiment? (e.g. kids, young teenagers, young adults, medium aged adults, empty nest adults, young seniors, old seniors; marginalized groups, people with special needs, ‘people at risk’, immigrants, students, teachers, families, communities, other target groups)</li> <li>• Which age groups will collaborate during the experiment?</li> <li>• How many users will be addressed directly by the experiment?</li> <li>• How many users will be addressed indirectly by the experiment?</li> <li>• Which actors, stakeholders, institutions, organisations or associations of the area will be involved?</li> </ul> <p>(for final users, intermediaries, both, other)</p>
<p>Organisational arrangements for the experiment</p> <p><i>Suggested length: ½ - 1 page</i></p>	<ul style="list-style-type: none"> <li>• When do you expect to start the experimentation?</li> <li>• When do you expect to finish the experimentation?</li> <li>• How often does the experiment take place (e.g. uniquely, at certain intervals, daily)?</li> <li>• Are there any important obstacles for the experimentation?</li> <li>• Do you need an extra expertise or help from a Big Foot partner in order to carry out your experimentation?</li> </ul> <p>(as specifically as possible set out when you will start and finish and important dates for the milestones and outputs of the project)</p>
<p>Location of the experiment</p> <p><i>(Multiple choice; please tick all relevant boxes and comment if necessary)</i></p>	<p><input checked="" type="checkbox"/> 1 = Formal settings</p> <p><input type="checkbox"/> 1.1 = Educational institute;</p> <p><input type="checkbox"/> 1.2 = Non-Governmental Organisation (NGO);</p> <p><input type="checkbox"/> 1.3 = Museum, library;</p> <p><input type="checkbox"/> 1.4 = Work based;</p> <p><input checked="" type="checkbox"/> 2 = Informal settings</p> <p><input type="checkbox"/> 2.1 = Community facility, building;</p> <p><input type="checkbox"/> 2.2 = Home based;</p> <p><input type="checkbox"/> 2.3 = Social setting;</p> <p><input type="checkbox"/> 3 = Combinations (please tick relevant box and describe);</p> <p>Comments/Description: _____</p> <p><input type="checkbox"/> 100 = Others (please tick relevant box and describe);</p> <p>Comments/Description: _____</p>

**Table 14:** Screening Questionnaire for Intergenerational Experiments (cont.)

DESCRIPTOR	DETAILS
Scale of the experiment  <i>Suggested length: ½ page if applicable</i>	<ul style="list-style-type: none"> <li>• Will the experiment be centred on the area of intervention (e.g. community based, local, and regional) or will it entail also a national, European or even international element?</li> </ul>
Learning activities (related to policy objectives) <sup>4</sup>  <i>(Multiple choice; please tick all relevant boxes and comment if necessary)</i>	<input type="checkbox"/> 1 = Community development, living & safety incl. intergenerational living and meeting places; <input type="checkbox"/> 2 = Education, training & learning incl. general education and training, Lifelong Learning, language learning, literacy, numeracy, digital literacy, senior universities, knowledge exchange, hobbies; <input type="checkbox"/> 3 = Mentoring i.e. intergenerational support, services and consultancy; <input type="checkbox"/> 4 = Mediation incl. problem/conflict solving, prevention of violent behaviour <input type="checkbox"/> 5 = Media education incl. Information and Communication Technologies (ICTs); <input type="checkbox"/> 6 = Social inclusion/participation, active citizenship; <input type="checkbox"/> 7 = Employability; <input type="checkbox"/> 8 = History and reminiscence incl. oral history, preserving cultural heritage, work with contemporary witnesses; <input type="checkbox"/> 9 = Health; <input type="checkbox"/> 10 = Arts incl. culture, theatre, play, music; <input type="checkbox"/> 11 = Environment & environmental protection; <input type="checkbox"/> 12 = Grandparents and grandchildren; <input type="checkbox"/> 13 = Travel, excursions & leisure time; <input type="checkbox"/> 100 = Others (please tick relevant box and describe); Comments/Description: _____

**Table 14:** Screening Questionnaire for Intergenerational Experiments (cont.)

<sup>4</sup> The list is based on a cluster analysis of intergenerational interests reported in the ‘Intergenerational Directory’ of the ‘Centre for Intergenerational Practice’ (CIP) and extended by EAGLE desk research activities; URL: <http://www.bjf.org.uk/Libraries/Local/66/Docs/IG%20Directory%20September%202005.pdf>; the list of learning activities also reflect key policy objectives of the European Commission as e.g. laid down in the (Joint) Social Inclusion Reports and Reports on Social Protection and Social Inclusion ([http://ec.europa.eu/employment\\_social/social\\_inclusion/index\\_en.htm](http://ec.europa.eu/employment_social/social_inclusion/index_en.htm)), the Communication from the Commission on ‘Adult Learning: It is never too late to learn’ ([http://eur-lex.europa.eu/LexUriServ/site/en/com/2006/com2006\\_0614en01.pdf](http://eur-lex.europa.eu/LexUriServ/site/en/com/2006/com2006_0614en01.pdf)), the Green Paper on ‘Confronting demographic change: a new solidarity between the generations’ ([http://ec.europa.eu/employment\\_social/news/2005/mar/comm2005-94\\_en.pdf](http://ec.europa.eu/employment_social/news/2005/mar/comm2005-94_en.pdf)), the integrated Lifelong Learning Programme ([http://ec.europa.eu/education/programmes/newprog/index\\_en.html](http://ec.europa.eu/education/programmes/newprog/index_en.html)) as well as the ‘i2010 – A European Information Society for Growth and Employment’ strategy ([http://ec.europa.eu/information\\_society/eeurope/i2010/index\\_en.htm](http://ec.europa.eu/information_society/eeurope/i2010/index_en.htm)).

DESCRIPTOR	DETAILS
Fields of Learning <sup>5</sup> :  <i>(Multiple choice; please tick all relevant boxes and comment if necessary)</i>	<input type="checkbox"/> 1 = Skills for the Knowledge Society; <input type="checkbox"/> 2 = Individual competence development (for private and professional purposes); <input type="checkbox"/> 3 = Societal/economic exchange and consultancy; <input type="checkbox"/> 4 = Development and continuity of societal values; <input type="checkbox"/> 5 = Productive cultural assimilation; <input type="checkbox"/> 100 = Others <i>(please tick relevant box and describe)</i> ; Comments/Description: _____
Knowledge & Learning Exchange/Flow between the target group(s)  <i>(Multiple choice; please tick all relevant boxes and comment if necessary)</i>	<input type="checkbox"/> 1 = Predominantly ‘downstream’ i.e. older to younger (e.g. handicrafts, hiking, contemporary witnesses, homework, economic start-up consultancy, orphan and day care, mentoring, mediation); <input type="checkbox"/> 2 = Predominantly ‘upstream’ i.e. younger to older (e.g. visitor services, lectures, ICT skills development, traveling); <input type="checkbox"/> 3 = Balanced and/or bi-directional e.g. shared activities (e.g. prevention of addiction, theatre, family genealogy, studying together, language learning, discussion circles) or offering activities to each other (e.g. ‘stock market’ or the exchange of knowledge, culture, sports, living communities, learning) Comments/Description: _____
Interactions between the target group(s)  <i>(Multiple choice; please tick all relevant boxes and comment if necessary)</i>	<input type="checkbox"/> 1 = one-to-one; <input type="checkbox"/> 2 = one-to-many; <input type="checkbox"/> 3 = many-to-one; <input type="checkbox"/> 4 = group based; <input type="checkbox"/> 5 = many-to-many; <input type="checkbox"/> 6 = physical/offline interaction; <input type="checkbox"/> 7 = virtual/online interaction; <input type="checkbox"/> 8 = blended interaction (i.e. combination of virtual and physical interaction); <input type="checkbox"/> 100 = Others <i>(please tick relevant box and describe)</i> ; Comments/Description: _____

**Table 14:** Screening Questionnaire for Intergenerational Experiments (cont.)

<sup>5</sup> Descriptions of the suggested EAGLE ‘Fields of Learning’ can be found on the EAGLE web site at <http://www.eagle-project.eu/welcome-to-eagle/pedagogical-didactical-approaches>

DESCRIPTOR	DETAILS
Categories of the learning activity <sup>6</sup> <i>(Multiple choice; please tick all relevant boxes and comment if necessary)</i>	<input type="checkbox"/> 1 = Formal i.e. takes place in education and training institutions, normally leading to recognized diplomas and qualifications; <input type="checkbox"/> 2 = Non-formal i.e. takes place alongside the mainstream systems of education and training and does not typically lead to formalised certificates; <input type="checkbox"/> 3 = Informal i.e. is a natural accompaniment to everyday life. Unlike formal and non-formal learning, informal learning is not necessarily intentional learning, and so may well not be recognised even by individuals themselves as contributing to their knowledge and skills; Comments/Description:
OECD/DeSeCo Competences addressed by the experiment <sup>7</sup> <i>(Multiple choice; please tick all relevant boxes and comment if necessary)</i>	<input type="checkbox"/> 1 = <i>Competence Category 1: Using Tools Interactively</i> <input type="checkbox"/> 1.1 = The ability to use language, symbols and text interactively <input type="checkbox"/> 1.2 = The ability to use knowledge and information interactively <input type="checkbox"/> 1.3 = The ability to use technology interactively <input type="checkbox"/> 2 = <i>Competence Category 2: Interacting in Heterogeneous Groups</i> <input type="checkbox"/> 2.1 = The ability to relate well to others <input type="checkbox"/> 2.2 = The ability to cooperate <input type="checkbox"/> 2.3 = The ability to manage and resolve conflicts <input type="checkbox"/> 3 = <i>Competence Category 3: Acting Autonomously</i> <input type="checkbox"/> 3.1 = The ability to act within the big picture <input type="checkbox"/> 3.2 = The ability to form and conduct life plans and personal projects <input type="checkbox"/> 3.3 = The ability to assert rights, interests, limits and need; Comments/Description: _____

**Table 14:** Screening Questionnaire for Intergenerational Experiments (cont.)

<sup>6</sup> The full definitions are based on the Commission Staff Working Paper SEC (2000) 1832 of the Commission of the European Communities (2000): A Memorandum on Lifelong Learning; URL: <http://www.bologna-berlin2003.de/pdf/MemorandumEng.pdf>

<sup>7</sup> Based on the Executive Summary 'The Definition and Selection of Key Competences' (DeSeCo) by OECD; detailed competence definitions can be found within the Executive Summary available at: <http://www.oecd.org/dataoecd/47/61/35070367.pdf>

DESCRIPTOR	DETAILS
EC Key Competences addressed by the experiment <sup>8</sup>  <i>(Multiple choice; please tick all relevant boxes and comment if necessary)</i>	<input type="checkbox"/> 1 = Communication in the mother tongue <input type="checkbox"/> 2 = Communication in a foreign language <input type="checkbox"/> 3 = Mathematical literacy and basic competences in science and technology <input type="checkbox"/> 4 = Digital literacy and ICT skills <input type="checkbox"/> 5 = Learning-to-learn <input type="checkbox"/> 6 = Interpersonal and civic competences <input type="checkbox"/> 7 = Entrepreneurship <input type="checkbox"/> 8 = Cultural awareness Comments/Description: _____
Expected outcomes of the experiment  <i>Suggested length: 1 – 2 pages</i>	<ul style="list-style-type: none"> <li>• <i>What are the expected outcomes?</i> (Please refer also to the question on the 'Rationale') (for example number of volunteers from this, and benefits for participants)</li> </ul>
Evaluation / validation of the experiment  <i>Suggested length: ½ - 1 page; some first ideas for the beginning; to be further specified and expanded during the Brussels workshop</i>	<ul style="list-style-type: none"> <li>• <i>When do you expect to start the evaluation / validation of the experiment?</i></li> <li>• <i>Which methodological tools do you expect to use for the validation of the experiment?</i> (e.g. questionnaires, interviews, focus groups, observations)</li> </ul>
Web 2.0 Technologies used during the experiment  <i>Suggested length: ½ - 1 page</i>	<ul style="list-style-type: none"> <li>• <i>Can you illustrate in brief which Web 2.0 or social applications you are planning to use to support the experiment?</i></li> </ul>
Links to the BIG FOOT web site (and others)  <i>Suggested length: ½ - 1 page</i>	<ul style="list-style-type: none"> <li>• <i>In which ways the experimentation will be connected to the BIG FOOT web site or to online space of the Carpathian Convention?</i></li> <li>• <i>Which interactive services do you need to present the experimentations online?</i> (e.g. e-Library, video library, blogs, wikis, Facebook, YouTube, twitter etc)</li> </ul>
External resources (online, offline)  <i>Suggested length: 1 page or more depending on the availability of resources</i>	<ul style="list-style-type: none"> <li>• <i>Which external resources are already available to illustrate the location and the experiment itself?</i> (e.g. videos, sounds / music, images/pictures, local figurative items, documents / books / notes etc )</li> </ul>

**Table 14:** Screening Questionnaire for Intergenerational Experiments (cont.)

<sup>8</sup> Based on the 'Framework for Key Competences in the Knowledge Society' by the European Commission's Working Group on Key Competences within the 'Education & Training 2010' Work Programme) available at: <http://ec.europa.eu/education/policies/2010/doc/basicframe.pdf>

### Annex III: Project Failure Prevention Analysis & Issues Plan

What factors could cause the project to fail?	Likelihood (Score 1 – 10)	Impact (Score 1 – 10)	Overall (Likelihood multiplied by Impact)
1)			
2)			
3)			
4)			
<i>tbc</i>			

**Table 15:** Project Failure Prevention Analysis (Template)

A Failure Prevention Analysis may sound like a very formal document but, put simply, it can be used to help you identify factors that may cause your Project to fail so you can make plans to prevent or manage them.

Start by listing any potential factors in the table above, grade the Likelihood of each of them occurring out of 10 (with 10 being very likely) and grade the Impact that factor would have on the Project. Finally, multiply the two numbers to give an Overall score – the ones with the highest overall scores are the factors that you should concentrate on preventing or managing as a priority.

You will not be able to prevent all of the factors, and some may be outside of your control, but completing this exercise should help identify some actions that you (and your team) need to take to ensure your Project goes according to plan.

A very brief sample table follows as an example:

What factors could cause the project to fail?	Likelihood (Score 1 = very unlikely – 10 = very likely )	Impact (Score 1 = low impact – 10 = high impact)	Overall (Likelihood multiplied by Impact)
1) Parents are not supportive of the project and don't want their children to participate	4	10	40
2) Transportation of participants becomes unavailable	2	2	4

**Table 16:** Project Failure Prevention Analysis (Example)

What potential issues might occur during the execution of the project?	Planned Way of Managing the Issue
1)	
2)	
3)	
4)	
<i>tbc</i>	

**Table 17:** Project Issues Plan (Template)

Highlight here likely or possible issues that may present in the duration of your Project and how you intend to manage them should they occur.

A very brief sample table follows as an example:

What potential issues might occur during the execution of the project?	Planned Way of Managing the Issue
1) The project requires specialist skills that we don't have (such as advanced IT skills)	Specialist skills to be identified in the project plan. Where other staff have specialist skills already they will be encouraged to share them.
2)	

**Table 18:** Project Issues Plan (Example)





# Crossing Generations, Crossing Mountains

The Big Foot project aimed at tackling common challenges of the rural mountainous regions, including the lack of economic opportunities and out-migration of the younger population, by applying a participatory intergenerational learning approach. The project demonstrated the value of enabling and valuing the skills and knowledge of both the older and the younger generations in order to enable innovative, creative and productive solutions for local sustainable development.

Based on current intergenerational programmes, initiatives and practices the Intergenerational Approach Handbook has been developed as a facilitator guide for communities, organisations and individuals by providing a framework to plan how activities can be developed to address their particular interests and to be a gateway to a range of resources to support and inform this planning. The Handbook can be also used as a reference document for people already engaged in programmes by presenting procedures for assessing and evaluating those activities.



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