

## **Active Age Planning Ltd: brief training case studies.**

### **Case study 1**

A large housing trust asked us to develop a single course to cater for the needs of two groups of staff – those thinking about retirement, or about to retire and those considering voluntary redundancy. The organisation was undergoing structural change and needed to reduce the size of its workforce, ideally through retirement and voluntary redundancy.

Our response was to design a two day course for up to 20 delegates which focussed on broad life planning and decision making, as well as covering the 'standard' issues covered in pre retirement training (the impact of retirement, budgeting, savings and investments, legal issues, health matters, pensions and state benefits, relationships and use of time in retirement – including learning, returning to the world of work, volunteering, setting up your own business, leisure and hobbies, etc.)

Because of the focus on life planning and decision making in this course, delegates were enabled to look into and model a variety of possible futures for themselves, and were thus more confident and positive about the options they selected.

The commissioning organisation was pleased with the outcome – delegates were more decisive about their future plans as a result of attending the course, and those considering voluntary redundancy more likely to choose this option, thus obviating the need to make compulsory redundancies. We have subsequently provided a number of similar courses for this organisation.

*It would be possible to run this course on the basis of a single day.*

### **Case study 2**

An organisation which had recently changed from being a department of a County Council to becoming a separate organisation asked us to do some work with some of its older members of staff. The brief was to help them decide 'whether to get on the bus or get off it'.

We designed a course which contained all of the elements of a pre retirement course, but had a stronger focus on change issues. We looked at the impact of change, attitudes to change, options and planning. This course helped staff to see that they had options; explore what their personal options were and plan for a future which was right for them, based on sound knowledge of financial and other issues. We were able to build an atmosphere of trust with the delegates so that they felt able to discuss their feelings about the changes they had experienced. This was in part because we were perceived as a third party outside the organisation with an objective view point. A bonus we felt was that many of the delegates, having started the course being somewhat cynical about their employer, had changed their view by the end of the course.

The commissioning organisation was pleased with the outcome – the delegates had made firm decisions, in some cases to retire, and in others, to accept new roles and working practices.

*This course was designed as a two day course, for maximum impact, but could be undertaken as a single day course.*

### **Case study 3**

A college in the midlands wanted to offer their staff a comprehensive pre retirement course but did not want them to be out for more than one day. We designed a fully comprehensive one day Planning for Retirement course for them, including a detailed work-book. The course was very well received by delegates and received excellent results in the organisation's training evaluation system.

### **Case study 4**

A university in the North West asked us to do some work for them at very short notice (a matter of days). They were planning to provide academic staff with pre retirement training, and had invited a financial adviser in to give a presentation. Shortly before the session, they realised that the subject of planning for retirement was much wider than just finance, and therefore asked us if we could 'broaden' the day out for them by doing some 'wrap around' sessions.

We designed a number of modules to fit around the financial adviser's presentation which made the course into a more holistic and comprehensive pre retirement course.

The course was very well received, and 'our' elements were particularly valued. The course commissioner was very pleased with the outcome.

### **Case study 5**

A large employers' organisation asked us to do two pieces of work for them – the first one was to design a pre retirement course for a pharmaceutical company in the South West. The company was very satisfied with the course and it was well received by their employees.

The second was to provide an 'open' course at short notice – for a session for which the programme had already been published, though no materials had been designed. We designed a set of materials to fit the published programme and also created a workbook and post course reference pack for delegates. The delegates were delighted with the course, and the course commissioner was very pleased with the outcome.

### **Case study 6**

A large organisation for whom we have worked for some time asked us to fill in a slot in their employee 'briefing' schedule. They wanted to improve overall financial literacy of staff. We designed a short session practical for them on budgeting, which would be both personally useful to staff and help them become more adept at finance and planning.

The course was well received by staff and the commissioner was very pleased with the outcome. As a result of the positive response we received to this work, we have now incorporated a simple budgeting session into some of our pre retirement courses.

### **Case study 7**

An organisation in the North East had recently introduced a flexible retirement policy. They were keen for staff to avail themselves of the opportunities offered by the policy, though few had hitherto expressed any interest. They asked us to help them publicise the new policy to staff. We designed a pre retirement course which included a number of case studies which referred to or explored flexible retirement issues.

The delegates rated the course highly and the course commissioner was very pleased with the outcome.

### **Case study 8**

An organisation for whom we already provide Planning for Retirement courses asked us to provide a course on managing aggression in the workplace.

We agreed aims and outcomes and designed an intensive single day course, which we ran for two groups of 12 staff. The staff were very much engaged with the materials and ideas presented and provided first class, positive feedback. We have since provided a number of other, similar courses for this client.

### **Case study 9**

We were invited to provide a course on 'managing aggression' on an open course basis for an organisation which provides training for a wide range of charities. We provided a generic course which would be relevant to people working with others in a wide range of settings, and covered issues around face to face working – both formal and informal, email and telephone.

The course evaluations were excellent and we have been asked to repeat the course.