

## **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 or about to retire and those considering voluntary redundancy. The organisation was undergoing structural change and needed to reduce the number 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 option they selected.

The commissioning organisation was please 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.

### **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. A bonus we felt was that 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.

### **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 on day. We designed a fully comprehensive one day pre retirement course for them, with a detailed work-book and take home information and reference pack.

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 was much wider than just finance, and therefore asked us if we could broaden it out for them.

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

The course was very well received, and 'our' elements were particularly well received.

The course commissioner was very pleased with the outcome.

#### **Case study 5**

A large organisation for whom we have worked for some time asked us to fill in a slot in their employee briefings 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 6**

A large employer's organisation asked us to do two pieces of work for them – one was to design a pre retirement for a pharmaceutical company in the South West. 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 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**

A large organisation asked us to provide a series of courses for them to meet the needs of a wide range of staff in different locations across the country. Some of the staff were reluctant to take more than half a day off at any time, whilst some wanted to attend a course which would give them plenty of time to explore and plan retirement. The staff were of mixed age – some were in the early stages of retirement planning, whilst others were due to retire very shortly. We designed a programme which included one two day course, three one day courses, two one day courses run in half day sessions and two half day sessions. Some of the courses were provided 'in house' and others in easily accessible 'off site' hotel or training venues. The variety was welcomed, and all of the courses very well received.

### **Case study 9**

A university asked us what we could do to help their administrative staff become more confident in dealing with academic staff. We designed two half day sessions which focussed on two main areas – 'finding your voice' and 'developing better meeting skills'. The course was very practical and included a lot of activities using NLP techniques to help develop confidence and improve communication skills.

The course was very well received and enjoyed by delegates, and the course commissioner was very pleased with the outcome.