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GUIDE FOR STAFF

free publication



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Title: Educational Needs and Best Practices for People Aged 55+ in Germany, Poland and in Europe

Subtitle: A Guide for Staff



Institutions:

SZ

bildung





Introduction and Background of the Project

The project “Educational Counselling to Improve the Quality of Life for People Aged 55+” (EDUCATIONforFUTURE), funded under the Erasmus+ KA210-ADU program, aims to address the educational needs of older adults. By fostering innovative educational counselling tailored for individuals aged 55 and above, the project seeks to enhance lifelong learning opportunities, promote social inclusion, and encourage active aging.

Key objectives include developing a non-vocational educational counselling service, preparing a comprehensive guide for adult education staff, and fostering transnational collaboration between German and Polish institutions. The project also emphasizes inclusion, equality, and non-discrimination, ensuring accessibility for diverse groups. Through these efforts, EDUCATIONforFUTURE aims to expand educational opportunities and improve the personal and social engagement of older adults in participating countries. This report is intended as a definitive guide in the field of educational counselling for individuals aged 55+. It provides a comprehensive framework to empower adult education staff with the tools, insights, and practical recommendations necessary to successfully deliver this specialized service.

The guide is structured into two main chapters. Chapter one contains an in-depth description of the advisory target group, highlighting their needs, expectations, and unique characteristics, key requirements for staff delivering the service, detailing the qualifications, skills, and competencies essential for effective engagement, a clear instructional framework for service management staff, offering practical strategies for oversight and coordination, organizational recommendations, including logistical and technical guidelines, to ensure the smooth and efficient implementation of the counselling service. Chapter two is a curated collection of resources and tools designed to support the delivery of educational counselling, facilitating tailored and impactful guidance for individuals aged 55+.

This guide aims to serve as a practical and impactful resource, fostering the successful implementation of educational counselling and contributing to the lifelong learning and personal growth of older adults.



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Action KA210-ADU - Small-scale partnerships in adult education

Educational counselling to improve the quality of life for people 55+ ("EDUCATIONforFUTURE")

Project No.: 2023-1-DE02-KA210-ADU-000127510

english version

PARTNERS:



SCHWERPUNKT ZENTRUM GMBH – a German company located in Dusseldorf that organizes training in the areas of training and mobility, training in work centres, employability, professional training, entrepreneurship, and the development of digital and transversal competencies aimed at students and teachers from all over Europe



<https://sch-bildung.de/de/default>



Fundacja „Fundusz Inicjatyw” (Poland) – a non-governmental organization dedicated to the promotion of the idea of lifelong learning, creating and providing conditions for the promotion and propagation of humanistic, pro-social, entrepreneurial and patriotic attitudes.



<https://ffi.org.pl/>



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Chapter 1: Goals, Requirements, and Implementation of the Guide



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1. Goals and programme of educational counselling for people aged 55+

General goals

General goals of “the educational counselling” service are:

- To promote and disseminate lifelong learning among adults in the EU, including partner countries.
- To provide people aged 55+ with new opportunities for educational and personal development.
- To reach and engage adults 55+ in Poland, Germany and in EU in non-vocational education.
- To support adults 55+ in making decisions about engaging in non-vocational education.
- To help people 55+ to choose adequate forms of education, tailored to their current needs, expectations, life situation, access to ICT tools, taking into account their past in the personal and professional sphere.
- To raise the number of people aged 55+ in Poland and Germany participating in non-vocational education.

Detailed goals

The detailed goals of the educational counselling are:

- To identify the 55+ learner's educational background (e.g. finished formal education, completed courses).
- To identify the 55+ learner's professional past (e.g. finished vocational trainings, possessed skills).
- To identify the 55+ learner's current life situation (e.g. daily responsibilities, time available for education, access to ICT tools, ability to finance education).
- To identify the educational needs of the learner 55+.
- To identify the educational possibilities of the learner 55+ (e.g. capabilities and limitations).
- To identify the educational expectations of the learner 55+.
- To identify the educational interests of the learner 55+ (e.g. passions and hobbies).
- To analyse the educational offer for adults in local / regional / national context.
- To propose to the learner 55+ a relevant lifelong learning offers.
- To motivate and encourage the individual 55+ to enrol and participate in lifelong learning.
- To monitor the effectiveness of the counselling and the learner's satisfaction with the service and/or undertaken education.



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The program of the educational counselling

The programme of “the educational counselling for people 55+” service will include five main steps.

1) First step

The first step aims at identifying the needs, possibilities, expectations and interests of the learner 55+, by conducting 4 diagnostic questionnaires with a learner.

This is the starting point for the service. The advisor will recognize the client's situation/needs/opportunities through four "diagnostic questionnaires" (completed by the learner or advisor). The questionnaires include elements such as: the learners' education background, professional history, previous training/educational experiences, current life situation, interests, educational needs, which may be answered by future educational initiatives. The questionnaires should be completed during one meeting between the learner and the advisor. The detailed programme and organizational recommendations for the meeting are included in the table below.

First meeting between an advisor and a learner 55+	Programme of the first step	Organizational recommendations
	<ul style="list-style-type: none"> • Explaining the goals and counselling programme to a learner. • Free conversation with the learner about his / her current situation/participation in education. • Conducting the Questionnaire of the learner's educational background (using a template). • Conducting the Questionnaire of the professional past (using a template). • Conducting the Questionnaire of the learner's current life situation (using a template). • Conducting the Questionnaire of the learner's educational needs and expectations (using a template). • Specifying with the learner his/her major educational needs and expectations. • The advisor completes the Educational Advisory Card - the work with the learner (using a template). 	<p>Time: around 45 minutes.</p> <p>Formula: face-to-face or remote (video meeting or phone call).</p>





2) Second step

The second step of the counselling is the advisor's analysis of diagnostic questionnaires in order to specify and profile the learner's educational goals and opportunities.

Based on the information contained in four diagnostic questionnaires, the advisor will obtain a number of information that will be useful in the process of profiling future education for a specific learner 55+, relating to both the needs and logistic possibilities of the individual as well as the substantive scope of training/classes that interest him/her.

Based on information about the learner's educational and professional past, the advisor should not propose services that would duplicate the adult's education or professional experience. For example, if the questionnaires show that the learner has a culinary education, the advisor should not profile his educational activity in areas related to gastronomy. If the learner has recently completed the course in the field of dietetics, the advisor should not profile the learner's future education for another training in dietetics. Based on the learner's interests and educational expectations, the advisor will obtain information:

- in what types of services would the learner prefer to participate in (short course, longer training),
- in what substantive areas will the educational activities be most attractive for the individual,
- how much time (daily / week) can the client devote to education,
- whether the adult can participate in distance education,
- whether the learner can travel to classes,
- whether the individual can afford to pay for educational services.

For example, if a learner indicated that he or she could devote 4 hours a week to education, the advisor should not consider time-intensive educational offers for the client (i.e. those that include daily activities of several hours per day). If a learner in his/her place of residence does not have access to a computer and/or to the Internet or has low computer/ICT skills, the advisor should not consider online/remote or blended learning educational services for the client.

3) Third step

In the third step, the advisor analyses the educational institutions and services available in a given territorial area based on the internet research and his/her own knowledge about the educational market.

The advisor's task is to thoroughly research possible services for his client in a given territorial area (e.g. city, commune - in the case of stationary classes, in the case of distance learning - without geographical limitations). Depending on the participant's preferences and financial capabilities, the advisor examines only free services (e.g. as part of EU/national projects), or also paid services.

Activities from the second and third steps are carried out by the advisor without the participation of the learner. The program and organizational recommendations are included in the table below.



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Advisor's own work - time between meetings with the participant	Program of the second and third step	Organizational recommendations
	<ul style="list-style-type: none"> • Analysis of the four questionnaires conducted with the learner and concretizing/profiling his/her educational goals for the future. • Analysis of the available educational institutions and lifelong learning offer in the market. • Identifying possible educational services on the market (according to the advisor's knowledge), which fit into the learner's established educational goals / needs / expectations. • Selection (assumed to be at least 2) of proposals for educational services for the learner (using a template). • The advisor completes the Educational Advisory Card - the advisor's own work (using a template). 	<p>Time: depending on the needs (estimated 3 – 3.5 hours). Form of service: advisor's own work without a learner.</p>

4) Fourth step

In the fourth step of the service, the advisor presents the learner with at least 2 proposals for educational/lifelong learning services, tailored to the learners 55+'s educational goals, interests and learning opportunities.

Formal education is also not excluded, e.g. by supplementing formal education by an individual. The advisor encourages the learner to choose one of the options and motivates him/her to take up educational activity.

The advisor can use a card template with suggestions for educational services for the learners.

The agenda and organizational recommendations of the meeting are included in the table below.



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The second meeting with the learner	Program of the fourth step	Organizational recommendations
	<ul style="list-style-type: none"> • Reminding the learner of the counselling goals and activities completed during the first meeting. • Presenting selected service proposals to the adult (using a template). • Conversation with the learner about the proposed educational/lifelong learning services. Ask the learner what his/her opinion is. • Optionally, contact with selected educational institutions (e.g. checking whether the service will start on time, asking about the schedule/place of the service, payment, etc.). • Trying to choose one service for which the learner would like to enrol in. • Encouraging/motivating the learner to take up a lifelong learning activity. • The learner completes the Educational Consulting Evaluation Survey (using a template). • The advisor completes the Educational Advisory Card - advisor meeting with the learner (using a template). 	<p>Time: around 25 - 35 minutes. Formula: face-to-face or remote (video meeting or phone call)..</p>

5) Fifth step

The last step of counselling service is to assess the learner's satisfaction with the service and monitor whether the individual has started any form of lifelong learning.

If possible, the advisor should also monitor the participant over a longer period of time, checking whether the learner continues education, for what period, with what results, and whether he or she is satisfied with the chosen form of education.

The program and organizational recommendations for the last stage of consulting are included in the table below.



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Remote contact with the learner	Program of the fifth step	Organizational recommendations
	<ul style="list-style-type: none">• Assessment of the learner's satisfaction with the educational counselling service based on the Interview Questionnaire, after completion of the educational counselling (using a template).• Monitoring whether the learner has undertaken any education.• Monitoring participant satisfaction with the education undertaken (if applicable).	<ul style="list-style-type: none">• Duration: depending on the needs (estimated 5-10 minutes). Form of service: telephone conversation.





The counselling course and schedule

The total consulting time per learner is approx. 4.5 clock hours (including two meetings and work of the advisor without the participant).

The service is planned to be conducted within 2 meetings of the advisor with the participant.

First meeting is planned to last around 45 minutes, and the second one is planned to last around 25-35 minutes.

Between meetings, the advisor has to complete his/her own tasks. Their own tasks, without the learner, are estimated to take around 3-3.5 hours. During the tasks the advisor should:

- analyse four filled questionnaires,
- specify the client's educational goals / needs / expectations / interests,
- analyse the educational market / the offer of educational institutions,
- search for the most adequate educational offers for the learner.

Counsellor may also contact with educational institutions to ask about the details of their educational offer.

The meetings are planned as face-to-face, but depending on the pandemic situation, the learner's health condition, the life situation and preferences, it can be partially or fully provided remotely (online or by phone).

Additional assumptions

The educational counselling service should take into account the following aspects:

- learning specifics of people aged 55+,
- conditions of educational and consulting work with people aged 55+,
- methodological workshop adapted to people aged 55+.

Educational counselling service has to be profiled for people who finished their professional activity or will do so in the near future (e.g. people in pre-retirement age, pensioners, people on pre-retirement benefits, retirees).

The counselling service should take into consideration the elements of human well-being in terms of personal interests, passions, knowledge and skills that increase the quality of life of people aged 55+.



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2. Description of the advisory target group

The advisory target group for this project is specifically tailored to adults aged 55 and above in Germany and Poland. This demographic consists of individuals who are at various stages of their post-professional life, either nearing retirement or having already exit the workforce. The group reflects a diverse range of characteristics, including but not limited to their employment status, health conditions, educational backgrounds, and digital literacy levels. By recognizing and addressing this diversity, the project aims to create a comprehensive, inclusive, and effective educational counseling service that responds to the needs of this demographic.

Key characteristics of the target group:

1. Age group:

The focus is on individuals aged 55 and older. This age bracket is particularly significant as it includes people who are transitioning from active professional life to retirement and those who are already retired. Many individuals in this group seek opportunities for personal development, social integration, and lifelong learning, but often encounter barriers that hinder their participation in such activities.

2. Socioeconomic and demographic diversity:

- The group includes both urban and rural residents, reflecting the socio-economic diversity present in Germany and Poland. In urban areas, people may have greater access to resources but may also face challenges such as digital exclusion, especially among older adults who have limited experience with technology. In contrast, rural residents might experience physical isolation and limited availability of educational services, thus requiring tailored outreach strategies.

- The project also considers the economic status of individuals, which varies from those who are financially stable to those living on limited retirement income or state benefits. These economic differences impact their ability to participate in non-vocational educational activities.

3. Health and physical conditions:

- This demographic includes both able-bodied individuals and those with disabilities or health conditions. As the aging population in Germany and Poland grows, the number of elderly individuals with chronic illnesses, mobility issues, or sensory impairments is also increasing. The project emphasizes inclusivity by ensuring that the advisory services are accessible and adaptable to individuals with varying health conditions. This includes providing remote or online counseling options for those who may have difficulty attending face-to-face sessions due to mobility or health limitations.



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4. Educational background and digital literacy:

- The target group is characterized by a generally low participation rate in formal and non-formal education. This is partly due to their diverse educational backgrounds, which range from individuals with basic education levels to those who have obtained higher qualifications but have not engaged in lifelong learning activities for several years.

- Digital literacy is another critical aspect. Many individuals aged 55+ in Germany and Poland face challenges related to the use of modern technology, which affects their ability to access educational resources and information. The project aims to bridge this gap by integrating digital literacy support within the advisory service, ensuring that the counseling provided is accessible and relevant to those with limited digital skills.

5. Social and psychological aspects:

- Social isolation is a significant issue among older adults, particularly in the post-COVID-19 pandemic period, which has exacerbated feelings of loneliness and disconnection for many elderly individuals. The advisory target group includes individuals who have experienced reduced social interaction due to retirement, health issues, or the loss of close companions.

- The counseling services will also cater to the psychological needs of these individuals by encouraging social engagement through group learning sessions, community activities, and tailored educational pathways that foster a sense of purpose, belonging, and personal growth.

Rationale for selection:

The target group of individuals aged 55+ has been chosen based on several socio-economic and demographic factors:

Low participation rates: Statistics indicate that participation in lifelong learning among the elderly is significantly lower in Poland and Germany compared to other EU countries. This project aims to address these low participation rates by developing accessible and inclusive non-professional educational counseling services that emphasize personal development rather than vocational skills.



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Social isolation: The pandemic has had a lasting impact on social habits, particularly for the elderly who may have lost community engagement opportunities. This project's counseling service will create new pathways for social and educational participation, enhancing their quality of life.

Diverse needs and expectations: Individuals aged 55+ often have varied expectations when it comes to learning and personal development. Some may seek courses related to hobbies and personal interests, such as arts, languages, or technology, while others may focus on health, wellness, or community involvement. The advisory service will be designed to offer personalized guidance based on individual needs, ensuring that the educational opportunities suggested are relevant, engaging, and accessible.

Digital exclusion: The target group includes individuals who face digital exclusion, either due to lack of skills or access. Addressing this issue is critical as digital skills are increasingly important for accessing educational services and resources. The project will incorporate strategies to support digital literacy among elderly participants, enabling them to engage more fully in lifelong learning activities.

Inclusion and equal opportunity approach:

The project is committed to ensuring that all individuals aged 55+ can benefit from the counseling services, regardless of gender, socioeconomic status, health condition, or digital literacy level. Specific measures will be taken to reach marginalized and disadvantaged groups, including those living in rural or isolated areas, people with disabilities, and those facing financial difficulties. All materials and services will be made accessible both in digital and physical formats, and the advisory sessions will offer flexible options such as remote or online consultations to accommodate different needs.

The advisory service will ultimately aim to empower individuals in this age group to take proactive steps towards engaging in lifelong learning, thus improving their social inclusion, psychological well-being, and overall quality of life.



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3. Requirements for staff providing service

Educational requirements:

- Higher education
 - Preferred field: Humanities
- At least 2 years of experience in one of the following:
 - Conducting educational training or workshops for adults,
 - Educational counselling or advising,
 - Working within the adult education sector.

Key competencies and skills required:

- Ability to create comprehensive and understandable educational pathways for adults aged 55+.
- High analytical skills necessary to weave personal interests, passions, knowledge, and skills of the participants into the proposed educational pathways.
- Strong empathy and patience to facilitate the process of educational counseling.
- Ability to set achievable, yet motivating goals for participants.
- High research skills necessary to find the best educational offers for participants.
- Strong interpersonal communication skills to facilitate communication with participants from diverse backgrounds.
- Open-mindedness to the opinions and feedback of the participants.
- Time management skills to ensure that counseling sessions are completed in a timely manner.

Other skills and recommendations:

- While the counseling is scheduled in-person, the counselor must be able to provide the service remotely (online or by phone) if the client's health condition prevents in-person service.
- The counselor should be skilled in navigating online environments to ensure that the career pathways prepared are well-researched, and to facilitate contact with the organizer and the participants.

The counselor ought to be well-versed in a variety of subjects and fields to be able to effectively respond to the experiences and needs of the participants.



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4. *Instruction for the service management staff*

The following instructions provide a detailed and structured approach to managing the educational counseling service, ensuring it operates smoothly and effectively.

1. Preparation and planning

- **Scheduling:** Develop a comprehensive schedule for advisory sessions that accommodates the availability of both counselors and participants. Ensure the allocation of appropriate venues and resources (e.g., digital tools for online sessions).
- **Resource allocation:** Prepare and maintain an inventory of necessary materials, including printed guides, digital devices, and technical support options. Ensure all staff have access to the latest resources and updates.
- **Staff training:** Conduct regular training sessions for counselors, focusing on skills such as participant engagement, remote counseling techniques, and digital literacy enhancement.

2. Conducting advisory sessions

- **Participant matching:** Match each participant with a counselor based on the participant's needs, ensuring the advisor possesses the expertise and skills relevant to the participant's goals.
- **Session structure:** Ensure that each session follows a structured format: initial meeting (needs assessment), follow-up meetings (exploration of educational options), and a final meeting (action planning and referral).
- **Feedback collection:** Collect feedback immediately after sessions through digital surveys or in-person forms to gauge participant satisfaction and identify areas for improvement.

3. Monitoring and evaluation

- **Session evaluations:** Use standardized tools, such as observation checklists and participant surveys, to evaluate the effectiveness of each session.
- **Quarterly reviews:** Organize in-depth reviews every three months to assess the service's overall performance, including counselor effectiveness, participant outcomes, and the relevance of educational pathways offered.
- **Continuous improvement:** Adapt the service based on evaluation results, incorporating new methods, training programs, or resources as needed.



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4. Reporting and documentation

- Session reports: Maintain detailed records of each advisory session, including participant details, session outcomes, and any follow-up actions required. Ensure all data is stored securely and complies with privacy regulations.
- Staff performance Records: Keep organized documentation on staff performance, including training records, session observations, and professional development activities.
- Quarterly reports: Compile quarterly performance reports summarizing key findings, participant feedback, and areas for improvement. Share these reports with project stakeholders and use them to guide service enhancements.

5. Crisis management and contingency planning

- Alternative counseling Methods: Develop contingency plans for transitioning to online or phone counseling sessions in the event of health emergencies or technical disruptions.
- Communication protocols: Ensure clear communication channels are maintained with participants and staff, providing timely updates during any service disruptions.
- Support systems: Offer technical and emotional support options for both participants and staff, especially during crisis situations that may impact service delivery.

By following these detailed instructions, the service management staff will contribute to the effective and efficient operation of the educational counseling service, ensuring it meets its objectives and supports the personal development of the target group.



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5. Organizational requirements and logistical and technical recommendations for the service

Organizational Requirements:

- Ensure that participants sign all the necessary documents throughout the process of counseling (questionnaires, advisory cards, etc.).
- Make every effort to ensure that no discrimination occurs at any stage of the counseling process based on the participant's age, religion, or gender. If participants or staff report such incidents, take appropriate action and notify relevant authorities.
- Consider the professional and personal situation of the participants to avoid excluding potential users of the service. Counselors ought to recommend both free and commercial educational offers to account for learners' economic situations and preferences.
- Provide materials that are easy to read and understand. If any participant reports difficulty in reading or accessing the materials, offer adjusted documents.
- Ask participants before counseling whether they have some specific needs or restrictions the staff should be aware of.

Logistical recommendations

- Ensure that rooms provide enough space for the participant and counselor to move freely. Additionally, make sure the rooms are properly ventilated and heated to adapt to weather conditions.
- Equip the room with comfortable and ergonomic seating. Prepare additional cushions for participants who request them.
- Ensure the building is equipped with measures to account for participants with reduced mobility (elevators, ramps, handrails, etc.).
- Make sure the venue is easy to find and appropriately marked. If the participants request help, provide instructions for reaching it.
- Ensure participants have access to drinking water during the counseling.

Technical recommendations

- Provide technical support to the participants and staff who request it. Additionally, offer appropriate instructions for navigating digital environments if participants are required to use these tools at any point during the counseling process.
- If a participant has trouble filling out the questionnaire (for example, due to writing, reading, or other challenges), an advisor can complete it for them. The advisor should make sure the answers reflect what the participant wants to say.
- Check and test electronic devices before their use in counseling.
- Provide participants with a contacts list in case they encounter any problems (including the contact numbers and emails for the organizer and staff).
- Secure any loose cables that might present a tripping hazard.



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Chapter 2: Resources for Conducting Educational Counselling



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1. Advisory cards for Meeting No. 1 and Meeting No. 2 with a learner

Advisory Card for Meeting No. 1 with a learner

1. Service data		
Counsellor's name and surname		
Participant's name and surname		
Date and time		
Form		

2. Task for meeting No. 1
<p>->During the first meeting, the learner completes four questionnaires with the advisor's help.</p> <ul style="list-style-type: none">• Questionnaire of the learner's current life situation• Questionnaire of the learner's educational background• Questionnaire of the learner's educational needs and expectations• Questionnaire of the professional past

Learner's signature

.....

Advisor's signature

.....



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Advisory Card for Meeting No. 2 with a learner

1. Service data		
Counsellor's name and surname		
Participant's name and surname		
Date and time		
Form		

2. Assessing learner's situation
-> Feedback regarding questionnaires
->Health, social, and economic conditions





-> Learner's strengths

-> Competencies, areas of interest, and professional aptitudes



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3. Discussing learner's educational opportunities

-> Areas for improvement

->Learner's career objective

->Expectations from the counselling service

-> Educational paths proposed to the learner



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-> Employment opportunities

-> Actions necessary to achieve the results

-> Recommendations for Further Action

Learner's signature

.....

Advisor's signature

.....



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2. *Advisory card for advisor's own work*

Advisory Card for advisor's own work

1. Service data		
Counsellor's name and surname		
Participant's name and surname		
Date and time		
Form		





2. Description of educator's own work

-> Analysis of questionnaires

->Specifying the client's educational goals

-> Research of the offers on the adult education market

->Evaluation of the offer of educational institutions and the adult education market

-> Educational offers matched to learner's needs



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->Contact with educational institutions

-> Proposed career pathways

->Goals to be achieved

-> Actions taken on learner's behalf

Learner's signature

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Advisor's signature

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3. Educational Offers Card for Learners

1. Service data		
Counsellor's name and surname		
Participant's name and surname		
Date and time		
Form of Counselling		

Educational Proposals

Proposal 1

Name of the Educational Offer	
Description of the Offer	
Mode of Delivery	
Duration	<input type="checkbox"/> online <input type="checkbox"/> in-person <input type="checkbox"/> hybrid
Expected Outcomes	





Proposal 2

Name of the Educational Offer	
Description of the Offer	
Mode of Delivery	<input type="checkbox"/> online <input type="checkbox"/> in-person <input type="checkbox"/> hybrid
Duration	
Expected Outcomes	

Proposal 3

Name of the Educational Offer	
Description of the Offer	
Mode of Delivery	<input type="checkbox"/> online <input type="checkbox"/> in-person <input type="checkbox"/> hybrid
Duration	
Expected Outcomes	

Recommendations for the Learner

Based on the learner's preferences and needs, the following educational offers are recommended. Please provide tailored advice on how these offers align with the learner's goals.





Next Steps

The learner should follow these steps to enroll in the selected educational offer(s):

1. Contact the educational institution.
2. Complete the enrollment process.
3. Prepare the necessary documents or prerequisites.
4. Confirm participation and start the program.

Signatures

Learner's Signature	Advisor's Signature	Date

Additional Comments:

Recommendations for the Learner



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4. Questionnaire of the learner's educational background

Instructions for Counsellor:

Dear Counsellor,

Thank you for assisting with the administration of this questionnaire. This tool is designed to help individuals aged 55 and above reflect on their educational background and explore opportunities for further education. Your role is crucial in guiding them through this process. Please follow these instructions to ensure a smooth and effective experience for the participants.

General Instructions

1. Inform the participants that the questionnaire is intended to help them evaluate their educational background and identify potential areas for further learning and development.
2. Each questionnaire should be completed in approximately 12 minutes. Ensure participants are aware of the time limit and encourage them to stay on track.
3. Be available to provide any necessary assistance or clarification to participants while they are completing the questionnaire.
4. Ensure all responses are kept confidential and used solely for the purpose of providing educational guidance.

Administering the Questionnaire

1. Start by explaining the purpose of the questionnaire and how it can assist them in planning their educational journey.
 - Example: "This questionnaire is designed to help you reflect on your educational background and consider opportunities for further learning. Your responses will help us understand your experiences and interests, and guide you in your educational journey."
2. Closed Questions: Guide participants through the closed questions. Encourage them to select the option that best fits their experience. If they choose "Other," make sure they provide a brief written explanation.
3. Open Questions: Encourage participants to share their experiences and thoughts in detail for the open questions. Assure them that their honest feedback is valuable and there are no right or wrong answers.



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Final Steps

1. Quickly review the responses to ensure all questions have been answered to the best of the participant's ability.

2. Use the responses to facilitate a discussion about potential educational paths and opportunities that align with their interests and background.

3. Thank the participants for their time and valuable input.

We appreciate your cooperation and support in making this guidance session successful. If you have any questions or need further assistance, please do not hesitate to contact us.



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Instructions for Learner:

Dear Participant,

Thank you for taking the time to complete this questionnaire. Your responses will help us better understand your educational background and assist you in identifying potential opportunities for further learning and development. Please follow the instructions below as you complete the questionnaire.

General Instructions

1. This questionnaire is designed to help you reflect on your educational background and explore opportunities for further education.
2. The questionnaire should take approximately 12 minutes to complete. Please be mindful of the time to ensure you can answer all the questions.
3. Your honest and thoughtful responses are valuable. There are no right or wrong answers, and your feedback will be kept confidential.
4. If you have any questions or need clarification while completing the questionnaire, please do not hesitate to ask the counsellor for assistance.

Completing the Questionnaire

1. For each closed question, select the option that best applies to your experience. If none of the provided options fit, please select "Other" and specify your answer in the space provided.
2. Please provide detailed responses to the open questions. Your insights and experiences are very important.

Final Steps

1. Once you have completed the questionnaire, quickly review your responses to ensure you have answered all the questions to the best of your ability.
2. Feel free to discuss your responses with the counsellor, who can provide guidance on potential educational paths based on your interests and background.
3. Thank you for your time and valuable input. Your responses will help us better support your educational journey.

If you have any questions or need further assistance, please do not hesitate to ask the counsellor.



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Service Data:

Counsellor's name and surname		
Participant's name and surname		
Date and time		
Form of Meeting		

Questions:

1.What is your highest level of formal education?

- ☐ High School Diploma
- ☐ Bachelor's Degree
- ☐ Master's Degree
- ☐ Doctorate Degree
- ☐ Other (please specify).....

2. How many years ago did you complete your highest level of education?

- ☐ Less than 10 years ago
- ☐ 10-20 years ago
- ☐ 21-30 years ago
- ☐ 31-40 years ago
- ☐ More than 40 years ago

3. What was the field of study you completed, and why did you choose this particular field?





4. Did you pursue any additional certifications or vocational training after your formal education?

- ☐ No
☐ Yes (please specify).....

5. Are you currently enrolled in any educational courses or programs?

- ☐ No
☐ Yes (please specify).....

6. What motivated you to pursue your highest level of education?

7. Can you describe any challenges you faced while continuing your education as an adult?

8. What types of educational resources or support have been most beneficial to you?

Additional Questions

9. How has your educational background impacted your career and personal development?

10. What advice would you give to other adults considering further education?



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11. What were your most significant achievements or experiences during your past education?

12. Is there a specific lesson or event from your educational past that stands out to you? If so, please share about it.

13. What skills or knowledge from your educational past do you find most valuable or useful in your daily life or professional career?





5. Questionnaire of the professional past

Instructions for Counsellor:

Dear Counsellor,

Thank you for your assistance in administering the questionnaire on the learner's professional past. Your role is vital in ensuring that participants feel comfortable and supported throughout the process. Below are the guidelines to help you facilitate this session effectively:

Introduction

1. Explain to the participant that the questionnaire aims to gather information about their professional past, which will help in understanding their circumstances and guiding them towards educational opportunities.
2. Assure the participant that their responses will remain confidential and will only be used for research purposes.
3. Inform the participant that the questionnaire should take approximately 12 minutes to complete, and encourage them to answer each question thoughtfully.

Administering the Questionnaire

1. Guide the participant through the closed questions, ensuring they select the most appropriate option for each question. If none of the provided options fit, encourage them to choose "Other" and specify their response.
2. Encourage the participant to provide detailed responses to the open-ended questions. Remind them that there are no right or wrong answers, and their honest feedback is valuable.
3. If time permits and the participant is willing, proceed with the optional questions to gather additional insights. However, prioritize the completion of the essential questions within the time limit.

Support and Assistance

1. Be prepared to clarify any questions or uncertainties the participant may have about the questionnaire.
2. Provide emotional support if the participant expresses any difficulties or challenges during the session.
3. Encourage the participant to reflect on their experiences and share openly, assuring them that their input is valuable and will contribute to meaningful insights.



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Final Steps

1. Before concluding the session, review the participant's responses to ensure all questions have been answered satisfactorily.
2. If the participant wishes to discuss any aspects of their responses further, be open to facilitating a discussion and providing guidance as needed.
3. Thank the participant for their time and participation. Reiterate the importance of their input.

Follow-up

1. Offer further assistance or support if the participant expresses a need for additional resources or guidance.
2. Invite the participant to provide feedback on their experience with the questionnaire session, including any suggestions for improvement.

Thank you for your dedication to supporting our participants through this process. If You need further assistance, please do not hesitate to contact us.



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Instructions for Learner:

Dear Participant,

Thank you for taking the time to complete our questionnaire on your professional past. Your input is valuable and will help us better understand your circumstances to provide relevant support and guidance. Please follow these guidelines as you proceed with the questionnaire:

Introduction

1. The questionnaire aims to gather information about your professional past, including your employment status, and overall satisfaction. Your honest responses will contribute to valuable insights.
2. Rest assured that your responses will be kept confidential and used only for counselling purposes. Your privacy is important to us.
3. The questionnaire should take approximately 12 minutes to complete. Please try to answer each question within the allocated time to ensure completion.

Completing the Questionnaire

1. For each closed question, select the option that best represents your situation. If none of the provided options apply to you, choose "Other" and specify your response.
2. Provide detailed responses to the open-ended questions. Your insights and experiences are valuable, so feel free to share openly.
3. If time permits and you are willing, you may also answer the optional questions to provide additional insights. However, prioritize completing the essential questions within the time limit.

Assistance and Support

1. If you have any questions or need clarification about any part of the questionnaire, don't hesitate to ask for assistance from the counsellor.
2. If any of the questions evoke strong emotions or if you find certain aspects challenging to discuss, take your time, and know that support is available.
3. Be honest and genuine in your responses. Your feedback will help us better understand your situation and provide relevant support.

Final Steps

1. Before submitting your responses, take a moment to review your answers to ensure they accurately reflect your circumstances.
2. Once you have completed the questionnaire, thank the counsellor for their assistance and your participation.

Thank you for your time and cooperation. Your input is invaluable to us, and we appreciate your contribution.



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Service Data:

Counsellor's name and surname		
Participant's name and surname		
Date and time		
Form of Meeting		

Questions:

1. How many years of professional experience do you have?

2. Have you ever been self-employed? If yes, for how long?

- ☐ No
☐ Yes, (for)

3. Have you ever experienced a significant career break (more than one year)? If yes, for how long?

- ☐ No
☐ Yes, (for)



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4. Which of the following sectors did you primarily work in before retiring or reducing your work hours? (Please select all that apply)

- ☐ Agriculture
- ☐ Business and Finance
- ☐ Education
- ☐ Health and Social Work
- ☐ Manufacturing
- ☐ Public Sector
- ☐ Technology
- ☐ Other (please specify).....

5. How would you describe your overall satisfaction with your professional life?

- ☐ Very satisfied
- ☐ Satisfied
- ☐ Neutral
- ☐ Dissatisfied
- ☐ Very dissatisfied

6. Please describe the roles and responsibilities you held in your primary profession.

7. What were the most significant changes in your profession during your career?

8. What has been the most rewarding job you have held, and why?

9. Reflecting on your professional journey, what are some skills or knowledge areas you wish you had learned more about?





Additional Questions

10. Which of the following barriers have you encountered in your career? (Select all that apply)

- ☐ Difficulty in learning new technologies
- ☐ Age discrimination
- ☐ Limited promotion opportunities
- ☐ Health-related issues
- ☐ Work-life balance challenges
- ☐ Lack of professional development opportunities
- ☐ Stereotypes about older workers
- ☐ Other (please specify): _____

11. What strategies have you found most effective for maintaining job satisfaction and motivation?

12. What motivated you to change jobs or careers, if you have done so?

13. Can you provide an example of a significant challenge you faced in your career and how you overcame it?

14. What were some of the most valuable lessons you learned from your colleagues or supervisors?



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6. Questionnaire of the learner's current life situation

Instructions for Counsellor:

Dear Counsellor,

Thank you for your assistance in administering the questionnaire on the learner's current life situation. Your role is vital in ensuring that participants feel comfortable and supported throughout the process. Below are the guidelines to help you facilitate this session effectively:

Introduction

1. Explain to the participant that the questionnaire aims to gather information about their current life situation, which will help in understanding their circumstances and guiding them towards educational opportunities.
2. Assure the participant that their responses will remain confidential and will only be used for research purposes.
3. Inform the participant that the questionnaire should take approximately 12 minutes to complete, and encourage them to answer each question thoughtfully.

Administering the Questionnaire

1. Guide the participant through the closed questions, ensuring they select the most appropriate option for each question. If none of the provided options fit, encourage them to choose "Other" and specify their response.
2. Encourage the participant to provide detailed responses to the open-ended questions. Remind them that there are no right or wrong answers, and their honest feedback is valuable.
3. If time permits and the participant is willing, proceed with the optional questions to gather additional insights. However, prioritize the completion of the essential questions within the time limit.





Support and Assistance

1. Be prepared to clarify any questions or uncertainties the participant may have about the questionnaire.
2. Provide emotional support if the participant expresses any difficulties or challenges during the session.
3. Encourage the participant to reflect on their experiences and share openly, assuring them that their input is valuable and will contribute to meaningful insights.

Final Steps

1. Before concluding the session, review the participant's responses to ensure all questions have been answered satisfactorily.
2. If the participant wishes to discuss any aspects of their responses further, be open to facilitating a discussion and providing guidance as needed.
3. Thank the participant for their time and participation. Reiterate the importance of their input.

Follow-up

1. Offer further assistance or support if the participant expresses a need for additional resources or guidance.
2. Invite the participant to provide feedback on their experience with the questionnaire session, including any suggestions for improvement.

Thank you for your dedication to supporting our participants through this process. If You need further assistance, please do not hesitate to contact us.



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Instructions for Learner:

Dear Participant,

Thank you for taking the time to complete our questionnaire on your current life situation. Your input is valuable and will help us better understand your circumstances to provide relevant support and guidance. Please follow these guidelines as you proceed with the questionnaire:

Introduction

- 1.The questionnaire aims to gather information about your current life situation, including your employment status, and overall satisfaction. Your honest responses will contribute to valuable insights.
- 2.Rest assured that your responses will be kept confidential and used only for counselling purposes. Your privacy is important to us.
- 3.The questionnaire should take approximately 12 minutes to complete. Please try to answer each question within the allocated time to ensure completion.

Completing the Questionnaire

- 1.For each closed question, select the option that best represents your current situation. If none of the provided options apply to you, choose "Other" and specify your response.
- 2.Provide detailed responses to the open-ended questions. Your insights and experiences are valuable, so feel free to share openly.
- 3.If time permits and you are willing, you may also answer the optional questions to provide additional insights. However, prioritize completing the essential questions within the time limit.

Assistance and Support

- 1.If you have any questions or need clarification about any part of the questionnaire, don't hesitate to ask for assistance from the counsellor.
- 2.If any of the questions evoke strong emotions or if you find certain aspects challenging to discuss, take your time, and know that support is available.
- 3.Be honest and genuine in your responses. Your feedback will help us better understand your situation and provide relevant support.

Final Steps

- 1.Before submitting your responses, take a moment to review your answers to ensure they accurately reflect your current circumstances.
- 2.Once you have completed the questionnaire, thank the counsellor for their assistance and your participation.

Thank you for your time and cooperation. Your input is invaluable to us, and we appreciate your contribution.



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Service Data:

Counsellor's name and surname		
Participant's name and surname		
Date and time		
Form of Meeting		

Questions:

1. What is your current employment status?

- ☐ Employed full-time
- ☐ Employed part-time
- ☐ Unemployed
- ☐ Retired
- ☐ Other (please specify).....

2. How satisfied are you with your current overall life situation?

- ☐ Very satisfied
- ☐ Satisfied
- ☐ Neutral
- ☐ Dissatisfied
- ☐ Very dissatisfied

3. How would you rate your current physical health status?

- ☐ 5 (Excellent)
- ☐ 4 (Good)
- ☐ 3 (Neutral)
- ☐ 2 (Poor)
- ☐ 1 (Very poor)





4. On a scale of 1 to 5, how would you rate your current mental well-being?

- ☐ 5 (Excellent)
- ☐ 4 (Good)
- ☐ 3 (Neutral)
- ☐ 2 (Poor)
- ☐ 1 (Very poor)

5. Are you currently facing any significant life changes or challenges?

- ☐ No
- ☐ Yes (please specify).....

6. Can you describe your current daily routine and activities?

7. What are your main goals or aspirations in your current stage of life?

8. Are there any specific obstacles or barriers you are facing in achieving your goals?

9. How do you cope with stress or difficult situations in your life?





Additional Questions

10. How do you manage your work-life balance, if applicable?

11. What resources or support systems do you rely on to navigate challenges in your current life situation?

12. In what ways do you feel your current life situation influences your desire or ability to pursue further education or personal development?

13. What strategies do you employ to maintain or improve your physical and mental well-being?

14. Is there anything else you would like to share about your current life situation that you feel is important for us to know?



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7. Questionnaire of the learner's educational needs and expectations

Instructions for Counsellor:

Dear Counsellor,

Thank you for your assistance in administering the questionnaire on the learner's educational needs and expectations. Your role is vital in ensuring that participants feel comfortable and supported throughout the process. Below are the guidelines to help you facilitate this session effectively:

Introduction

1. Explain to the participant that the questionnaire aims to gather information about their educational needs and expectations, which will help in understanding their circumstances and guiding them towards educational opportunities.
2. Assure the participant that their responses will remain confidential and will only be used for research purposes.
3. Inform the participant that the questionnaire should take approximately 12 minutes to complete, and encourage them to answer each question thoughtfully.

Administering the Questionnaire

1. Guide the participant through the closed questions, ensuring they select the most appropriate option for each question. If none of the provided options fit, encourage them to choose "Other" and specify their response.
2. Encourage the participant to provide detailed responses to the open-ended questions. Remind them that there are no right or wrong answers, and their honest feedback is valuable.
3. If time permits and the participant is willing, proceed with the optional questions to gather additional insights. However, prioritize the completion of the essential questions within the time limit.

Support and Assistance

1. Be prepared to clarify any questions or uncertainties the participant may have about the questionnaire.
2. Provide emotional support if the participant expresses any difficulties or challenges during the session.
3. Encourage the participant to reflect on their experiences and share openly, assuring them that their input is valuable and will contribute to meaningful insights.



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Final Steps

1. Before concluding the session, review the participant's responses to ensure all questions have been answered satisfactorily.
2. If the participant wishes to discuss any aspects of their responses further, be open to facilitating a discussion and providing guidance as needed.
3. Thank the participant for their time and participation. Reiterate the importance of their input.

Follow-up

1. Offer further assistance or support if the participant expresses a need for additional resources or guidance.
2. Invite the participant to provide feedback on their experience with the questionnaire session, including any suggestions for improvement.

Thank you for your dedication to supporting our participants through this process. If You need further assistance, please do not hesitate to contact us.



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Instructions for Learner:

Dear Participant,

Thank you for taking the time to complete our questionnaire on your educational needs and expectations. Your input is valuable and will help us better understand your circumstances to provide relevant support and guidance. Please follow these guidelines as you proceed with the questionnaire:

Introduction

1. The questionnaire aims to gather information about your educational needs and expectations, including your employment status, and overall satisfaction. Your honest responses will contribute to valuable insights.
2. Rest assured that your responses will be kept confidential and used only for counselling purposes. Your privacy is important to us.
3. The questionnaire should take approximately 12 minutes to complete. Please try to answer each question within the allocated time to ensure completion.

Completing the Questionnaire

1. For each closed question, select the option that best represents your needs and expectations. If none of the provided options apply to you, choose "Other" and specify your response.
2. Provide detailed responses to the open-ended questions. Your insights and experiences are valuable, so feel free to share openly.
3. If time permits and you are willing, you may also answer the optional questions to provide additional insights. However, prioritize completing the essential questions within the time limit.

Assistance and Support

1. If you have any questions or need clarification about any part of the questionnaire, don't hesitate to ask for assistance from the counsellor.
2. If any of the questions evoke strong emotions or if you find certain aspects challenging to discuss, take your time, and know that support is available.
3. Be honest and genuine in your responses. Your feedback will help us better understand your situation and provide relevant support.

Final Steps

1. Before submitting your responses, take a moment to review your answers to ensure they accurately reflect your needs and expectations.
2. Once you have completed the questionnaire, thank the counsellor for their assistance and your participation.

Thank you for your time and cooperation. Your input is invaluable to us, and we appreciate your contribution.



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Service Data:

Counsellor's name and surname		
Participant's name and surname		
Date and time		
Form of Meeting		

Questions:

1. How would you rate your current level of digital literacy?

- ☐ Very low
- ☐ Low
- ☐ Moderate
- ☐ High
- ☐ Very high

2. What is your primary goal for pursuing further education or training? (Select one)

- ☐ Personal development
- ☐ Professional development
- ☐ Social interaction
- ☐ Other (please specify).....

3. How often do you prefer to engage in educational activities?

- ☐ Daily
- ☐ Several times a week
- ☐ Weekly
- ☐ Monthly
- ☐ Less frequently





4. What type of learning environment do you prefer?

- ☐ Online
- ☐ In-person
- ☐ Hybrid (both online and in-person)
- ☐ Self-paced
- ☐ Structured courses

5. Please describe any specific educational topics or subjects you are interested in pursuing.

6. If you could design your ideal educational program, what key features would it include?

7. What are your expectations from an educational counselling service?

8. Can you provide examples of past learning experiences that you found particularly effective or enjoyable?

Optional Questions

9. Would you be interested in participating in group learning activities with peers of similar age?

- ☐ Yes
- ☐ No





10. How do you think educational institutions could better cater to the needs of learners in your age group?

11. What kind of support structures (e.g., tutoring, mentoring, technical support) do you think are essential for learners in your demographic?



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8. Evaluation survey of educational counselling completed by a learner during last meeting with the advisor

We appreciate you taking the time to share your feedback on the counselling sessions you had with your advisor. This survey is designed to collect your honest opinions to help us enhance the quality of our educational services.

Please answer the questions based on your experience, and rest assured that all responses will be kept confidential. Your insights are valuable and will contribute to improving our services.

Thank you for your participation!

Gender	Male	<input type="checkbox"/>	Female	<input type="checkbox"/>	Other	<input type="checkbox"/>		
Age	<50 66-70	<input type="checkbox"/> <input type="checkbox"/>	51-55 71-75	<input type="checkbox"/> <input type="checkbox"/>	56-60 76-80	<input type="checkbox"/> <input type="checkbox"/>	61-65 >80	<input type="checkbox"/> <input type="checkbox"/>
Employment Status	Employed	<input type="checkbox"/>	Unemployed	<input type="checkbox"/>	Retired	<input type="checkbox"/>	Upskilling	<input type="checkbox"/>
Education Level	Primary	<input type="checkbox"/>	Secondary	<input type="checkbox"/>	Higher	<input type="checkbox"/>	Other	<input type="checkbox"/>





Mark the appropriate column with X.

Scale:

1: Strongly Disagree/Very Dissatisfied/Never/Very Poor

5: Strongly Agree/Very Satisfied/Always/Excellent

Criteria	1	2	3	4	5
1. What is your overall satisfaction with the counselling service?					
2. Were the instructions clear?					
3. Was the counsellor's expertise satisfactory?					
4. To what extent was the scope of the advice provided appropriate to your needs?					
5. How would you assess the advisor's dedication and readiness to provide guidance?					
6. Did the counsellor sufficiently address your questions?					
7. Did you feel understood and respected throughout the process?					
8. To what extent has your knowledge of the subject covered in the advisory service increased?					
9. Were you sufficiently informed about potential vocations?					
10. Was the direction of your education discussed sufficiently?					
11. Were the skills to be obtained in each proposed education path comprehensively described?					
12. Were the accommodation conditions satisfactory?					





Criteria	1	2	3	4	5
13. Was the organization of the consulting service adequate?					
14. Did the consulting service sessions begin and end on time?					
15. Would you be interested in using individual advisory services again in the future?					
16. What actions or initiatives do you think would draw more people to seek out advisory services?					





9. Interview questionnaire conducted by the advisor with a learner a few days/weeks after counselling

This questionnaire is designed to gather feedback from learners a few days or weeks after they have received educational counselling. Your responses will help us understand the long-term impact of the counselling and improve the services we offer. Your insights are valuable and will be kept confidential.

General Information

Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Other
Age	<input type="checkbox"/> <50 <input type="checkbox"/> 51-55 <input type="checkbox"/> 56-60 <input type="checkbox"/> 61-65 <input type="checkbox"/> 66-70 <input type="checkbox"/> 71-75 <input type="checkbox"/> 76-80 <input type="checkbox"/> >80
Employment Status	<input type="checkbox"/> Employed <input type="checkbox"/> Unemployed <input type="checkbox"/> Retired <input type="checkbox"/> Upskilling
Education Level	<input type="checkbox"/> Primary <input type="checkbox"/> Secondary <input type="checkbox"/> Higher <input type="checkbox"/> Other

Feedback on the Counselling Service

Please rate the following statements based on your experience, using the scale provided. Scale: 1 = Strongly Disagree, 5 = Strongly Agree

Criteria	1	2	3	4	5
I was able to apply the advice provided during the counselling sessions.					
The counselling helped me make informed decisions about my education.					
I feel more confident in pursuing my educational goals.					
The advice provided has positively impacted my life.					
I would recommend this counselling service to others.					





Open-Ended Questions

1. What specific advice or strategies from the counselling sessions have you found most helpful?
2. Were there any challenges or difficulties you faced in implementing the advice provided? If so, please elaborate.
3. How could the counselling service be improved to better meet your needs?



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The "Educational Needs and Best Practices for People Aged 55+ in Germany, Poland, and Europe" guide aims to empower adult education staff with practical tools and strategies to enhance lifelong learning opportunities for older adults. Through innovative counselling methods, we hope to foster a more inclusive and engaging learning environment that supports the personal growth and social inclusion of individuals aged 55 and above.

We encourage educators, institutions, and stakeholders to utilize this guide as a resource to improve educational counselling services and contribute to the lifelong learning journey of older adults across Europe.

For More Information:

Visit our partner websites:

- [SCHWERPUNKT ZENTRUM GMBH](#)
- [Fundacja „Fundusz Inicjatyw”](#)

Contact Us:

For any inquiries or feedback, please reach out to our project coordinators through the contact details provided on our official websites.

Thank you for your commitment to advancing education for future generations.



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