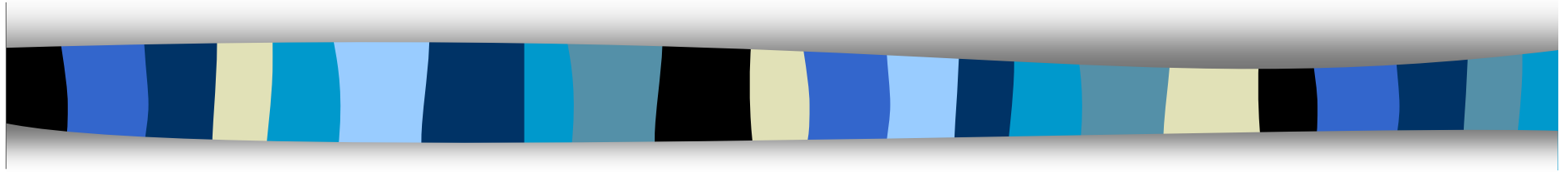


# **Lifelong Learning in Later Life**

**Professor Brian Findsen**

**University of Waikato**

**Hamilton, New Zealand**



**Presentation at the University of the Sunshine  
Coast, Australia**

**2 September 2008**



# Overview of Presentation

1. Perspectives on older adult learning in relation to lifelong learning
2. A critical paradigm - using a political economy approach
3. Research project based in Scotland - older adults in formal education



# Personal Journey

- Keen on sociological issues (e.g. social inequities; differential power across groups)
- Study leave in Athens, Georgia, USA; Guildford in Surrey; Stirling in Scotland - focus on educational gerontology
- ASPBAE “representative” in 1999 for New Zealand at conference on Older Adult Learning
- Empirical research on older adults’ learning (NZ), 2001-2003  
Book published, Learning Later, 2005 (Krieger, Florida)  
Empirical research in Greater Glasgow, Scotland, 2006-2008

# NEW ZEALAND





# Contexts for learning

- Formal: institutionalised, chronologically graded; hierarchical
- Non-formal: systematic, organised educational activity outside of formal settings
- Informal: acquiring knowledge, skills , values & attitudes from daily living

Older adults – most learning occurs in latter two categories



# The third age of learning

- Based on Peter Laslett's *A fresh map of life* (1989)
  - First age: early socialisation; dependency on others
  - Second age: adult maturity with multiple responsibilities (family, work, social relationships)
  - Third age: fuller autonomy of individual; potential for creativity
  - Fourth age: one of dependency
- Critique: romanticised; overly-gendered and class based



# Learning in the third age

- Demographic changes
- Older adult learners (OALs) - most learning **not** in formal contexts
- Virtual exclusion of OALs from HE
- Marginalisation of majority - is HE irrelevant?



# Concept of lifelong learning

- Faure report of 1972: emphasis on lifelong learning; life-wide; greater democratisation
- Rights of OALs to education throughout life
- Instrumental versus expressive forms of learning
- Plenty of self-initiated learning (e.g. U3A)
- HE - barriers? Institutions - status-laden; credentialing factories; OALs' fear from past schooling?



# Different kinds of learning needs

- McClusky (1974) identified four types of needs:
- **Coping**: adults engaged in physical fitness, economic self-sufficiency; basic education
- **Expressive**: taking part in activities for their own sake; not necessarily goal oriented
- **Contributive**: adults as useful contributors to society (e.g. volunteering)
- **Influence**: adults becoming agents for social change (e.g. against Council tax)



# Educational gerontology

- “Interface of adult education and social gerontology” (Peterson, 1976). Typically:
- 1. Education for older adults
- 2. Public education about ageing
- 3. Education of (para) professionals in field of ageing

NB Fits comfortably into lifelong learning agenda



# Participation patterns for OALS

- Varying definitions of “learning” and “education”
- In UK, plateau or decreasing participation of seniors in adult education (NIACE)
- Scant presence of OALs in HE
- Exception of Open University
- Overall patterns echo of earlier generations: issues of prior education, social class, gender, ethnicity



# Types of adult education organisations

- Self-help agencies: controlled by older adults to meet their own learning needs (e.g. U3A)
- Agencies which develop programmes specifically for older adults (e.g. Elderhostel; Senior Studies Institute; pre-retirement Association)
- Mainstream providers: some courses that might appeal to older adults (e.g. Centres for continuing education)
- Agencies which ignore older adults (no provision; no facilities suitable for them)

NB Plenty of non-educational agencies engaged in education: Age Concern; City Councils; Help the Aged; Grey Power)



# Exemplar of OAL self-controlled agency: University of the Third Age

- Autonomy: control of own curriculum & pedagogical practices
  - Movement exists in many (mainly Western) countries  
NB China as new participant
  - Open entry & minimal costs
  - Tend to emphasise peer learning in democratic framework
  - Curriculum tends to focus on liberal arts
  - Meet in conducive environments
  - Group size restricted (usually 15-20)
- Critique: primarily white middle-class membership



# What does older adult education look like?

- Philosophical diversity
- More on coping skills & individual development
- Less often a vocational emphasis
- Stereotype of expressive forms of learning
- Little related to developing critical capacities among older adults



# Critical perspectives

- Away from deficit models
- Towards empowering approaches
- Phillipson (2000):
  - Political economy approach (gender, class, ethnicity, geography, role of the state)
  - Humanist concern for the meaning of life for older people
  - Biographies & narratives related to social construction of later life



# Political economy approach: social class & ageing (NZ)

- Myth of a “classless” society
- Recent neo-liberal reforms have widened gap between rich & poor
- Changes in structure of labour market: from primary (agriculture) to services (e.g. tourism)
- Patterns of FT work in flux: notion of a “career” fragile
- Older adults at the fringes of workforce (PT; volunteers)
- Removal of compulsory retirement – new dynamic



# Political economy approach: gender & ageing

- Social construction of ageing highly gendered i.e. women typically disadvantaged through patriarchy
- Older age is increasingly feminised (numbers game)
- Burden of care predominantly on women
- Women majority of “returners” to education
- Retirement difficult: a “man’s problem”? A roleless state? A major challenge to identity & status.
- Women do vast majority of volunteering & caring



# Issue: Learning in the workplace

- Changing economic circumstances under global capitalism
- Diverse life trajectories with regard to education, work & leisure (in parallel rather than sequential)
- Ambivalence concerning older adults in workforce: individuals themselves; employers; governments
- Generally, declining role of older adults leads to wastage of talent
- Need to marshal accumulated experience of older workers (mentoring programmes)



# Issue: Learning in the workplace

(continued)

- Differential work & income opportunities amid older adults
- Career pathways more precarious, especially for older workers at margins of labour market
- Move from “worker” to “non-worker” not clearcut
- Reluctance of employers to invest in older workers (e.g. worker education)
- Pre-retirement education - of what kind?



# Notion of retirement

- “Retirement” becoming problematic - **right** to retire? **Need** to retire?
- Fractional work arrangements more possible? Alongside volunteerism?
- Patterns of continuity & discontinuity
- Learning a new identity a challenge, especially for professionals
- Freedom to adopt more versatile work & life patterns

# Geographic Context

## ■ West of Scotland





# Context of the project

- Aim: older adults' engagement with FE and HE in West of Scotland
  - Qualitative study
  - Primarily student perspective
  - Funding - West Forum (£20K literature review; £100K empirical study)
  - Began December 2005; due completion Aug 2008
  - Steering Committee



# Theoretical framework

- Critical educational gerontology
- (Older) adult participation in formal learning
- Pathways of adult learning
- Widening access in education
- Social inclusion
- Social justice



# Policy Context

- Active ageing policy
  - UN Vienna Plan of Action on Ageing (1982);
  - WHO Active Ageing (2002);
  - All our Futures (2007)
- Lifelong learning policy
  - NIACE Learning to Grow Older and Bolder (1999)
  - A Smart, Successful Scotland (2001);
  - Learning through Life: Life through Learning (2003);
  - Learning for All (2005)
- Drive for enhanced recruitment, retention, progression and outcomes in post-compulsory education



# Research Design

- Two-year study involving bi-annual, semi-structured face-to-face interviews
- Four Colleges, three HEIs participating
- 85 older learners (50 years +)
- Resident in 40% most deprived households
- Both credit & non-credit learning



# Characteristics of the sample

- Mainly resident in DZ4 and DZ5 areas;
- Gender distribution: 52% male; 48% female
- Age distribution (58% in 50s; 32% in 60s; 9% in 70s; 1% in 80s)
- Ethnicity (92% white; 5% other; remaining 3% Asian/Asian British; Mixed; Chinese)
- 69% of cohort study part-time
- 74% on courses leading to certificate or qualification



# First interview focus

- Learning histories (early years; return/entry to formal learning; work history; wider life learning)
- Current learning (programme; finance; triggers; barriers; motivation; institutional contact & guidance)
- Future learning (aspirations for learning impact; future progression)



# Framework – studies on motivation

- Morstain and Smart (1974) six factor analysis of motivation:
  - Social relationships
  - External expectations
  - Social welfare
  - Professional advancement
  - Escape/stimulation
  - Cognitive interest



# Findings

- Multiple motivations prevalent
  - More than 2/3rds specifying two or more motivating factors
- Prevalent themes:
  - Work-related
  - Subject interest
  - Desire to learn



# Goal-orientated learning

- ~90% students state goal-orientated motivations
- Vast majority partly or wholly linked with life transitions
  - Predominantly responsive
  - Also pre-emptive of future events



## Goal-orientated learning (cont'd)

- Work-related reasons single most frequently stated factor, in facilitating:
  - employment
  - career change
  - financial security through regular work
  - acquisition of job-specific skills/qualifications
- Not consistently *career advancement*
- Majority work-related learning in 50-54 age group; declines steeply towards retirement age



## Goal-orientated learning (cont'd)

- Family considerations  
(parents/partners/children and partners/  
grandchildren) also significant, in striving  
towards:
  - developing relationships (across distance;  
using subject matter; critical thinking)
  - sustaining relationships (over distance)
  - Increased intergenerational learning



# Family considerations

- “...Spanish: because the girls [daughter and grandchildren] have moved to Spain and my son and daughter-in-law, as I say, if they decide to have children, they will learn German; you feel as though you have to make the effort. And as I say, the computing’s for me and I can keep in contact with everyone on email. Because they’re all over the place.”



# Trigger events/episodes

- As a responsive choice:
  - ~ half of respondents describe a recent event/episode which influenced decision to engage in formal learning, through:
    - Independently seeking out provision
    - Being responsive to suggestion from family/friends
- Suggests learning choice often reactive
- Strong role of learning in adaptation to transitions



# Trigger events/episode (cont'd)

- Often extremely emotionally involving times/events:
  - Personal/familial illness - mental and physical (e.g. compulsory cessation of work, death of spouse/parent)
- Permanent impact on structure and quality of everyday life (becoming housebound, inability to work)
- Learning one option taken in adjustment process



# Learning in response to illness

- “When my mother got ill...that was a hard time...She wasn't that bad at times...I mean, I could leave her alone...That encouraged me. I said, 'I have to do something, you know'. I didn't want to go and drink...You see how education can open up your mind and through education...it gives you knowledge and through knowledge you'll get the understanding.”



# Funding mechanisms used by part-time (older) students

- Structural lag: main focus on full-time school leaver students
- Relative lack of awareness of eligibility

Majority of students (70%) in receipt of financial assistance towards study:

- 41% through Fee Waiver
- 14% by Individual Learning Account (ILA)
- 15% through other means (e.g. employer)
- 29% self-financing



# Wider life impacts of learning

- Social policy working towards ‘active learning’ and more holistic stance
- Report multi-dimensional impacts
- Value of learning seen to be predominantly personal, but significant number also found it to be ‘extremely’ or ‘very’ valuable in their wider lives (63.5%)



## Wider life impacts of learning (cont'd)

Interrelated impacts reported:

- Types of learning (informal, non-formal)
- Spheres of learning (work, social, familial)
- Personal learning (physical and mental health)



## Learning aspirations (future benefit)

- Choice of ‘personal’ (self), ‘family’, ‘wider’, ‘working’, and ‘educational’ lives
- Recognised inter-relation of benefits of learning:
  - 56% self
  - 27% family
  - 24% working lives
  - 20% educational lives
  - 15% wider lives



# Conclusions - Motivation

- Multiple and interactive orientations of learning
- Longer presence of work-related motivations until retirement age; likely due to socio-economic status of cohort
- Learning for learning's sake and subject interest remain key motivating factors
- Further research required to examine dialectic between trigger events and decision to return to formal learning



# Conclusions - Learning Benefits

- Funding mechanisms of significant importance for student cohort to enable participation
- Learning benefits reported consistent with international active ageing policy and recommendations
- Scope for awareness-raising of funding availability, and for eligibility to be broadened