

Older Adults' Communities of Learning and Practice

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The theme of this conference is *Communities of Learning: Communities of Practice* with cross-cutting strands of *learning at work*, *learning in communities* and *learning in the family*. This provides an enormously broad canvass on which to address contemporary perspectives of what it means to be an older adult in the twenty-first century and what kinds of learning are senior citizens (here arbitrarily defined as 55 years or older) engaged in. I am choosing to concentrate on the following aspects of what is increasingly called *third age learning*:

- Older adults' learning and the lifelong learning agenda
- The social context of older adults' lives
- Myths and realities of older adults
- Participation in and providers of older adult education
- Issues faced by older adults – the workplace and retirement; cultural variations in responses to ageing.
- Areas for future enquiry (research opportunities).

1.0 Older adults' learning and the lifelong learning agenda

1.1 Who are older adults?

There is no single definition of adult and there is no corresponding agreement on who is an older adult. Usually age, psychological maturity and the adoption of social roles point to 'adult' status but each culture has its own markers of determining who is an adult – drinking age; permission to marry without parental consent; driving licence age etc. These are some indicators of adulthood in Western societies. Similarly, just who qualifies to be labelled 'older adult' will vary from place to place and at different stages in history. In this discussion I include anyone over the age of 55 since this is often a crucial time in an individual's life in Western societies when key decisions are made concerning the role of paid work and 'retirement'. Increasingly, in almost all nations, there are higher proportions of older adults in comparison with younger cohorts in demographic structures. It is clear that these 'new old', especially the 'baby-boomers' (Glendenning, 2000), will develop more clout in how society works and have considerably more political power in the future. The advent of the third age has obvious consequences for policy makers at all levels of nations - local bodies, regions and nations.

1.2 The third age of learning in a lifelong learning context

In a landmark book entitled *A Fresh Map of Life* describing the new possibilities for older adults, Peter Laslett (1989) explains main phases in people's lives: the first age of early socialisation and childhood where typically the young are dependent on adult guidance and care; the second age of adult maturity where often we engage in careers, childrearing and earning a living; the third age is one of fuller autonomy and self-fulfilment as we relinquish the responsibilities of the second age. The fourth age is one of final dependency leading to death. The depiction of the third age entails an optimistic vision and should be valued for its refusal to accept deficit theories of ageing where commonly decrepitude has been overly-emphasized. On the other hand, it fails to acknowledge the diversity among older adults including differences of life-

chances related to social class, gender, ethnicity, geographical location and (dis)ability.

The term *educational gerontology* has been in existence for a few decades though its meaning has been subject to change. This term has been used often as a synonym for “older adult education”. As soon as we mention ‘education’ we need also to discuss its relationship with ‘learning’. One of the essential positions that I take is that we need to concentrate more upon learning and less upon education if we are to fully comprehend the rich dimensions of people’s lives, including those of older adults. Research across countries consistently demonstrates (e.g. Sargent, 1997) that the participation levels of older adults in education (organized, structured learning) is not as high as national norms for adult participation yet the diversity of learning activities among older adults is considerable. While it is useful to investigate educational participation of older adults (i.e. understanding education structures and provider profiles) we should also consider other forms of learning in which they engage.

1.3 Contexts for Learning

Jarvis (1985, p3) has pointed out that there are three contexts for learning:

Informal learning – the process whereby every person acquires knowledge, skills, attitudes and aptitude from daily living;

Non-formal learning – any systematic, organized, educational activity carried on outside the formal system to provide selected types of learning to particular subgroups of the population;

Formal learning – the institutionalised, chronologically-graded and hierarchical educational system.

For most people the first category occurs ordinarily in daily life with little conscious thought to the process. The work undertaken by Canadian Allen Tough (1979) is significant. He investigated adults’ *learning projects* where he attempted to gain insights into how much time and effort adults invested in learning projects – i.e. a major learning effort which is a deliberate and sustained (minimum of 7 hours) attempt to gain some clear knowledge or skill. Tough was able to demonstrate “that ‘the average adult’ spends about 90-100 hours on each learning project, conducts eight such projects every year, and plans or directs the projects personally” (Tennant, 1988, p.10). An application of this kind of approach to a study of older adults learning patterns would help us understand more about what they do outside of usual educational structures. It is this emphasis, in part, which I am currently using in a research study to understand the learning patterns of older adults in Auckland.

The second category is popular in the lives of many older adults. Non-formal learning contexts for older adults are plentiful. Many older adults are members of recreational groups, arts organizations, social welfare agencies, community learning centres or voluntary organizations in which they play major roles. In some instances, such as the University of the Third Age (U3A), learning activity is the primary task of members. In grandparent roles, too, older adults may be active players in inter-generational programs, significant for their own personal learning and for the learning of the wider community. Non-formal learning constitutes a very significant portion of older people’s lives.

The third category may consist of tertiary education providers such as universities, TAFE and community colleges where there is a clear hierarchical structure, often related to credentialism and usually more vocationally-oriented. Not many older adults participate in such learning contexts (Carlton & Soulsby, 1999) because they often prefer more expressive forms of learning and they may have longstanding inhibitions about entering formal education based on their own schooling experiences (Pearce, 1991). Formal learning contexts sometimes evoke fear, performance anxiety and expectations of passivity (Caffarella & Merriam, 1999). Practitioners working with older adults have a positive role to play in helping to demystify educational institutions and to help build better bridges between these providers of learning opportunities and older people's daily living routines.

1.4 Policy Links

In recent times governments have made more explicit comments on the importance of lifelong learning as part of their commitment to keeping economies internationally competitive and workers more knowledgeable and skilled in their workplaces (see, for instance, in New Zealand, the statements in *Learning for Life 2*). As long ago as 1972, the Faure Report trumpeted the central role of lifelong learning for people to enjoy fruitful lives in their manifold adult roles – as parents, workers, volunteers, grandparents, caregivers, co-learners. From within this report, at least three central concepts are perceived as fundamental to lifelong learning: “vertical integration”, “horizontal integration”, and the democratizing of the education system in the name of a learning society. In this context, vertical integration is significant i.e. the idea of continuing to learn throughout life in all its phases (lifelong learning). This is as important for older adults as for young children. This is coupled with horizontal integration i.e. acknowledging the equal status of learning derived from formal, informal and non-formal contexts (life-wide learning).

In the policy documents of most Western countries, the emphasis has been placed on vocational education and training. It is assumed that the concept of lifelong learning applies to full-time workers rather than older adults, most of whom have retired from the paid workforce, at least on a full-time basis. Withnall (2000, pp.88-89) points to the British experience of three major policy reports related to lifelong learning in the UK (Kennedy, 1997; National Committee of Inquiry into Higher Education, 1997; Fryer, 1997) doing little justice to the treatment of non-economic, personal and social benefits of lifelong learning. The instrumental purposes of education take precedence over the expressive.

2.0 The social context of older adults' lives

2.1 Introduction

One of the key characteristics of older adults as a collective is their heterogeneity. It would be foolhardy of anyone to project stereotypical images of older adults with respect to how they handle social change. We would expect the usual range of human reactions to any new societal developments, from tight conservatism to extreme liberalism but historical time and cohort effects are likely to be deeply influential in how individuals welcome or retreat from social change. By *historical time* I refer to the actual time in history in which a person lives and the events that individual is likely to have experienced. For instance, the historical period of my father was one in

which he had experienced “the Great Depression” and he subsequently spoke often of the impact this had on his outlook on life. One impact was for him to not take risks in life and to be cautious in his work.

The *cohort effect* is also a likely significant factor in one’s decision-making and life chances. This refers to a group of people who share the same norms and have similar life experiences. In its broadest context, the “baby-boomers” constitute a major cohort whose life experiences and expectations are quite different from previous generations. As Sheehy (1995) has pointed out in *New Passages*, this cohort is forging new directions for what older people may be capable of, towards the creation of an “ageless” society.

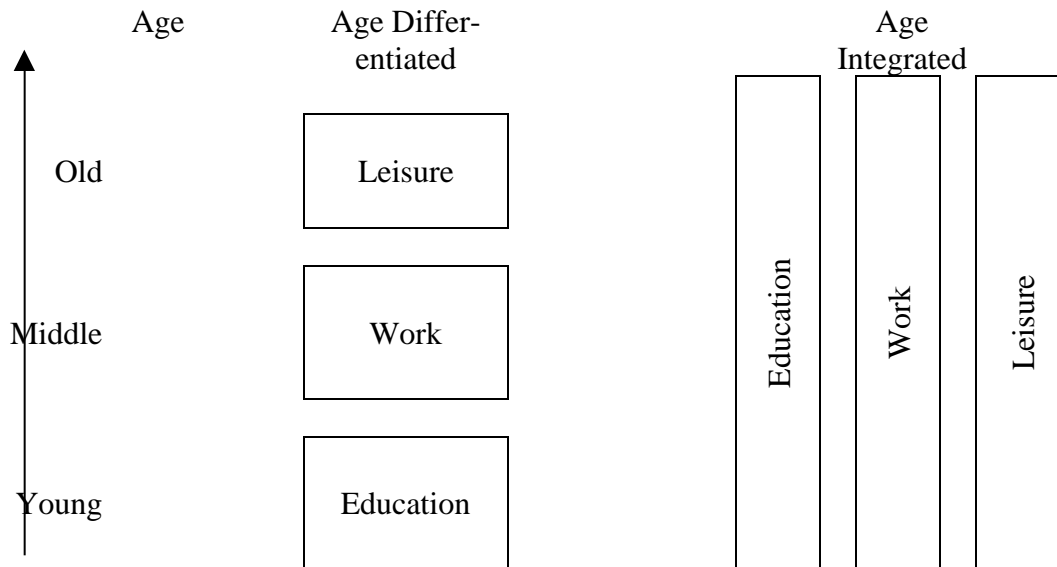
In the context of New Zealand society, a cohort of Maaori (indigenous) families migrated from rural locations to the big cities for work during the 1960s and 1970s. This urbanization had a major impact on subsequent Maaori settlement and work patterns, especially as communities from rural areas commonly became fragmented in the city environment. Today, while some older Maaori return to their *marae* (community meeting place, including formal meeting house and communal facilities) to be with their *hapu* (sub-tribe) to reinforce their identity, many stay in the urban location. Hence, older Maaori have differential experiences in later adulthood, depending to a large degree on the extent to which they adhere to traditional values and gender-associated behaviours.

Contemporary views of older people contain considerable ambivalence – whether they are a “burden” or an “asset” to society is frequently related to the state of the economy. In times of financial stringency, older folk are more often treated as outcasts whose frailties are not required in the workforce; on the other hand, in times of economic largesse, there is plenty of room for older people to contribute to the economy in part-time or full-time work and they are seen as a positive force, providing valuable role models for younger workers (Phillipson, 1998).

2.2 *The concept of structural change*

In an insightful analysis of the inter-relationships between older adults and social change, the work of Riley and Riley (1994) on the concept of *structural lag* plays a prominent role. The problem of structural lag is described as a “mismatch or imbalance between the transformation of the aging process from birth to death and the role opportunities, or places in the social structure, that could foster and reward people at the various stages of their lives” (p.16). In essence, age structures lag behind changes in people’s lives. Social structures, norms, and institutions have failed to keep pace with what people actually do in their lives. There is a dialectic in operation here – people are influenced by, and at the same time are influencing, structures in the family, the school, the workplace and the community.

Figure 1: Ideal Types of Social Structures



Source: Riley & Riley, 1994, p.26

In the figure presented above, the age-differentiated structures on the left divide societal roles and their occupants into three rigid “boxes”: educational roles for young people; work roles for the middle-aged (whether paid or unpaid); retirement and leisure for older people. While these structures may now seem outdated, nevertheless this schema has provided the predominant structure and cultural norms for Western societies. It is one which sees education and learning restricted to early in life; one which privileges middle-aged men as the primary breadwinners; one which romanticizes older age (for those lucky enough to get there) as the domain for leisure and recreation.

On the right of the figure is depicted an alternative, albeit ideal-typical age integration of education, work and leisure as simultaneous activities throughout life. Such a social arrangement would give no stage of life special privilege to learning, work or recreation; it would provide flexibility in lifestyle which some people are already living. For older adults, this model encourages them to continue to engage in learning, whether for instrumental or expressive needs; it allows for work to supplement whatever pension they may have. This new conception of reality frees up the range of activities available to anyone at any point of life.

3.0 Myths and realities of older adults

One of the effects of using a label such as “older adults” is to suggest that there is a recognizable group of people who share common characteristics. At a simplistic level, this may be true. It is possible to define older adulthood by chronological age alone based on biological aging. Yet, older adulthood is as much a social construction as it is a physiological one (Phillipson, 1998). As a consequence, there are myths which have been built around purported capabilities of older adults and societies’ expectations for what they can and should do. I explore several myths around older adults and the consequences of their continuance.

3.1 The myth of homogeneity

Older adults are not a uniform group. In fact, there are major variations among sub-groups of older adults according to gender, social class, ethnicity and other variables. Arguably, as people age, there are more rather than fewer distinctions among individuals and sub-groups (Heppner, 1996). Hence, it is more accurate to speak of the heterogeneity of older adults and it may be misleading to continue to use the label “older adult” without qualification of its usage. There is an inherent philosophical paradox here – on the one hand, the labelling of older adults can accentuate the “otherness” of this large class of people and perhaps unintentionally reinforce their separateness and difference from the rest of humanity; on the other, not to do so renders older adults invisible and therefore, impotent as a political force in societies. No arguments of equality of access to educational resources could be made without emphasizing difference or their special character as a group.

3.2 The myth of decrepitude

An over-riding image of older adults gleaned from early literature, especially of a medical type, is that of people in declining health waiting around for death (James, 1990; Caffarella & Merriam, 1999). In the USA especially, much research, especially that connected to cognitive and physiological functioning, has depicted older adults as mentally less capable, as physically frail and as dependent on others for life’s necessities. Fortunately, many of the results of this early research have been debunked

and the current attitude towards older adults' development is more positive (Drewery, 1991). The vast majority of older adults are fit and healthy, wanting to participate more fully in daily life and wanting to take more control over their own learning.

3.3 The myth of (in)dependence

One of the strongest beliefs promulgated in adult learning literature is that adults have the capacity to be increasingly independent as life continues (Knowles, 1980). The notion of *self-directed learning* has been attached to this ideal of the independent person (usually male). However, the adult learner does not exist in a social vacuum but is linked to other people in social relationships. Nobody can be fully independent, except perhaps as a hermit.

A common perception of older adults is that as they enter the upper limits of the third age, they become increasingly dependent on others, often close family. This is a physical reality not to be discounted. However, as Drewery (1991) argues, it is much more helpful to emphasize the notion of *interdependence* in adulthood. Each person has knowledge and skills not readily replicated by others (each of us is unique); these are often exchanged in daily life for things we need. Older adults do engage similarly with younger generations. Grandparents and grandchildren take part informally in inter-generational knowledge and skill exchanges. In particular, note that in learning about new technologies, it is often the young child teaching the older adult. Sometimes exchanges between generations are institutionalized in educational programmes (Lamdin & Fugate, 1997).

3.4 The myth of consumer

Frequently older adults have been depicted as “takers” in society, of receiving financial payment from governments (at least in Western countries) while producing little in return. (Of course, older people have been the taxpayers of previous generations). Within adult education, this image of consumer has been quite strong as is related to a *needs-based* approach to the education of older adults. McClusky (1974), a pioneer in educational gerontology in the USA, distinguished between different types of educational need: coping needs; expressive needs; contributive needs; and influence needs.

The depiction of older adults as consumers has been strongly associated with educational programmes which emphasize coping and expressive needs rather than contributive and influence ones. Elders have been encouraged, by and large, to adapt to the status quo, to the prevailing social system. Courses in “Adjusting to retirement” or “Becoming self-sufficient”, for example, focus on such coping skills. Also, expressive forms of adult education tend to reinforce individualistic pursuits, to encourage the person towards self-improvement rather than to community development. These two categories of programmes (based on coping and expressive needs) depict older adults as consumers of education, as reactors to what society has to provide. I argue that much of the potential for older adults will rely on their participation as *producers*, more particularly based on contributive and influence needs.

4.0 Participation in and providers of education

4.1 Older adult participation issues

The issue of participation in adult education has been longstanding. It can be summarized as investigating who gets access to education and why. Of course, the quality of that education matters too. While there have been numerous theoretical investigations, empirical studies and policy reports from around the globe, the treatment of older adults per se has been relatively scant.

Very often the issue of (non) participation has been concerned with the engagement of adults in planned educational activity, more often than not, supplied by an agency where formal classes are the norm. In this situation, “participation” is really attendance of older adults in learning events planned by somebody else and provided to the senior citizen as a service. The older adult is a consumer of this service (not a producer). This occurs most strongly when the learning needs of older adults are linked to coping and expressive mechanisms.

I argue for a wider, more liberating, notion of “participation”. Older adults are seen to engage in manifold fruitful learning activities, many of which are self-directed and independent of an educational provider and others of which are community-based and non-formal.

In sociological terms, adult participation is important because it can be readily demonstrated across diverse national contexts that the bulk of engagement in structured learning is undertaken by mainstream society members, not by marginalized groups. Typically, those who have already benefited from previous education are more likely to get more (as unsurprisingly, they have greater knowledge of how the system works for them and they are intent on retaining the status quo) (Bourdieu, 1974; Collins, 1998). This profile of the “active participant” is also true for older adult communities. As a frequently marginalized subset of the general population, older adults tend to get the crumbs from the supper table of educational provision.

For older people, the historical time in which they were children in schools, is more than likely to heavily influence the extent of their marginalisation. Also, if we analyse the heterogeneity of older adults – look at specific sub-populations within older adults – then we are likely to find that participation is strongly associated with previous educational experience, gender, race/ethnicity and social class (Carlton & Soulsby, 1999).

4.2 What does older adult education look like?

In terms of provision of educational opportunities for older adults, the range is enormous and generally mirrors the complexity found in other domains of adult education. Programs can be concerned with individual development and coping skills or focus on recreational and leisure pursuits. Less often they relate to fostering vocational skills (though this might change with the growing need of retired adults to find further income); still less are they concerned with developing critical capacities of elders to challenge the social order.

Just as the programs available to older adults are diverse in philosophy and what they encompass, the actual providers (agencies) themselves are similarly complex. In the Australian context, the Australian Senate Standing Committee on Employment, Education and Training of 1991 sought to map the field of adult and community education. The emergent matrix of providers and types of programs is recorded here:

Figure 2 : Matrix of Providers & Programmes

ADULT EDUCATION AND TRAINING: MAJOR AREAS AND PROVIDER SECTORS

	Adult Basic Education	General Interest	Training/ Vocational	Public Education
Formal Education	*****	**	* **	*
Govt. Depts. and Agencies	**		***	*****
Community Providers	***	****	**	*
Private Providers		*****	*****	
Enterprises/ Unions/ Prof. Assocns.	*		*****	*

Come in Cinderella Report 1991

Source: Australian Senate Standing Committee on Employment, Education and Training, 1991, p.25

This matrix is provided as an example of a typology which has been developed to try to encapsulate what might be included in the field of adult and community education. By and large, older adults have been stereotyped as engaging in more *expressive* than *instrumental* forms of learning. This stereotype has developed because “in retirement” older adults are meant to have more time to devote to personal development tasks (as opposed to those associated with paid work).

4.2.1 A typology of adult education organizations

In general, there are at least four types of adult education organizations in terms of provision for older people:

- those self-help agencies controlled by older adults to meet their own learning needs (e.g. University of the Third Age (U3A));
- those agencies who develop programs explicitly for older adults (e.g. Elderhostel; the Pre-Retirement Association);
- those mainstream providers who develop some courses which might appeal to older adults (e.g. retirement programs run by centers for continuing education);
- those who ignore or neglect older adults (no provision is made for them and no facilities have been established to encourage their participation). (Findsen, 1999, p.23).

The reality is that in most communities there are few educational agencies that have been established with older adults as the constructors of the knowledge or that have this group as their primary target. This could reflect the relative powerlessness of older adults in youth orientated cultures (Phillipson, 1998). However, there are certainly many mainstream providers who have provided a token level of support, that is, they establish a few courses which they hope will appeal primarily to older adults (e.g. preparing for retirement). The harsh reality is that there are still more agencies that have neglected older adults' learning needs. There is an immediate challenge here for raising the consciousness of such providers to their responsibilities of working with traditionally marginalized groups, inclusive of older adult sub-populations.

Workers in an adult education agency are encouraged to ask themselves some questions:

- What do you know about the life patterns and learning opportunities for older adults in your vicinity?
- What is the responsibility of your agency to helping to meet learning needs of older adults?
- What do you really know about the older adult clientele attending your programmes?
- Are any older adults involved in helping to plan your provision?
- Does the existing programme reflect interests and needs of older adults in your community?
- Have any programmes been planned in association with agencies which work more closely with older people (e.g. Age Concern)?
- Are there any statements of policy developed by your organisation about the learning needs of older adults?

4.3 Outside the education sector

The above typology assumes that the organization has an *educational* role. The range of educational options reflects the degree to which these agencies are overtly carrying out provision for older adults. Aside from this categorization of educational purpose, there are many organizations concerned about the social issues facing older adults (e.g. Age Concern; City Councils; Grey Power; Help the Aged; the Pre-Retirement Association). While their principal goals and main activities may not be explicitly related to education, it is likely that education is a means by which they would want to fulfil their mission. Education is often a supportive strategy or a subsidiary goal. Whatever the case, there is also great potential on local or national scales to encourage greater collaboration amongst such agencies and to work alongside older adults in the enhancement of quality living. Learning is a close partner to living; social and educational issues can become intertwined so that by addressing older adults' social issues we are often addressing their educational needs too.

The initiative recently taken by the Blair Government in the UK, *Better Government for Older People*, is a realization of the need for organizations to work more effectively on a co-operative basis (Carlton & Soulsby, 1999). The sponsoring body, the Department for Education and Employment, recognized that a co-ordinated approach to older adults' issues is required to effectively use scarce resources from multiple players in social education. Whatever our contexts as practitioners, if educational and social agencies can co-operate to focus on the material and social conditions of older adults in communities, it is far more likely that the impact will be more positive and enduring.

5.0 Issues faced by older adults

5.1 The workplace and retirement

5.1.1 Learning in the workplace

Older adults, in increasing numbers, are either forced to continue paid work in order to survive financially or they opt for part-time work, perhaps in conjunction with voluntary endeavour. The logistics of global capitalism, technological advances and sheer demographics may steer many older people back into a workforce which may (or may not) be prepared for them. Stereotypes abound, based on deficit notions of older workers' capabilities, that people are past a "use-by date" in their 50s!

Fortunately, some organizations and employers recognize the merits of a mixed age workforce (such as the mentoring of young/new workers) and acknowledge that very often older workers bring positive attitudes of commitment, reliability and durability to a workplace (Henretta, 1994; Jarvis, 2001).

One obstacle which employers need to confront is the idea that older workers do not need (re)training because they have less time left with the company or they are less capable of learning. This myth of unsuitability for training or further education is exposed in the National Institute of Adult Continuing Education's Discussion paper of 1993 entitled *The Learning Imperative*. In this document NIACE confirm statistically that training declines with age and urges the British Government and employers to take positive action to address this wastage of human talent. They cite Schuller and Boston's Carnegie Enquiry into the Third Age (1992) as the basis for the assertion that:

nine out of ten employees over the age of 50 receive no training at all; and training and education are used most by those with the most extensive initial education (20% of people with higher education qualifications, compared with 3% with no qualifications at all)” (NIACE, 1993, p.23).

Further, this report points to the importance of recognizing prior learning in making provision for older adults and the imperative to marshal the accumulated experience of older workers as trainers and mentors.

5.1.2 The changing workplace

In Riley and Riley’s conception of the lifecourse (1994), work is forever present in our lives. While Laslett’s second age has traditionally been the main platform for paid work (though for some, a lifetime of unemployment persists), the third age stereotypically has been characterized by increasing leisure and reduced or no paid work. This situation presupposes an individual’s ability to be economically self-sufficient and/or be a recipient of a government or private-funded pension. While this may be the case for people in lifetime stable careers, in the (post)modern world there is considerably more uncertainty for guaranteed work or work at a sustainable level.

For older adults, the reconfiguration of work has had dire consequences for those at the margins of the workforce who enter later life with few financial resources and little capacity to undertake meaningful part-time work (Thomson, 1999). On the other hand, those older adults who have benefited from secure employment and generous super schemes, the future is much brighter, coupled with the more assured financial base and the capability to work further, if necessary. In short, there are differential work and income opportunities available to different categories of older adults, dependent on such variables as social class, gender, race/ethnicity and geographical location. Those adults with more extensive educational backgrounds are much more likely to sustain themselves when economic times get tough.

The structure of the labour force is changing, aligned to governments’ desires to have an “up-skilled” workforce capable of competing internationally in the global marketplace. Hence, the nature of work itself is in flux. According to Thomson (1999), the predominant patterns of full-time paid work, enjoyed without question in the past, are under considerable threat. The notion of a person, more often male, continuing in sustained work until 55 to 65 years of age, is becoming less the norm. Not uncommonly, a person may be prematurely removed from the workforce at age 50 as a result of redundancy, and find it very difficult to resume full-time work. If a person is a member of a minority group such as Pacific Islanders in New Zealand or Australian Aborigines, then the pathway of a career may be very precarious indeed. Given that life expectancies are increasing, this leaves many people’s lives in considerable uncertainty in the third age (Laslett, 1989). In addition, some governments (e.g. New Zealand) recently curtailed compulsory retirement, thus introducing a new dynamic into the economic landscape. As identified by Phillipson (1998, p.197) “older workers increasingly find themselves on the margins of the labour market...” and their position within it is often contradictory. As the market expands, older workers are encouraged back; if it contracts, they are often first to be forced out.

Given the above scenario, what are the implications for older adults? First, the traditional approach to “retirement” needs an overhaul as do the educational programs

geared towards its successful attainment. Not everyone gets to retire; not everyone wants to! Some may opt for a combination of part-time paid work; some voluntary work; some planned leisure. The move from “worker” to “non-worker” is no longer clear-cut. Certainly, for women, the pattern of employment is usually different from the linear path of men. As identified by Lamdin and Fugate (1997, p.148):

Some can't retire because their unpaid work never ends. These people are mostly women whose work has been in the home and the community, neither of which gives them a pension or the option of formally calling it quits.

So, pre-retirement education will need to be more individually-based as the pattern of retirement has become less regular. The exception to this scenario would be those groups of older people who come from collectivist cultures where co-operation rather than competition is the underlying predominant modality of activity.

5.1.3 Retirement in the (post) modern world

It is clear that depending on one's position in the labour force, the decision to “retire” may be freely made, forced upon us through redundancy or unfavourable employment policy or made as a reluctant life choice. Some individuals have the *right* to work (employment policies allow this to occur); some (probably most) have the *need* to work. Older adults are treated differentially in both aspects, related to their wider political-economic environments.

The provision of social welfare or mandated private pension schemes in many countries has enabled many older adults to retire when once this was not possible. Also, the promotion of the concept of *active retirement*, spurred by better health amenities, has now encouraged older adults in greater numbers to engage more fully in life, including in achieving their learning goals. The dramatic development of Learning in Retirement (LIR) programs in the USA, Elderhostel internationally, and of the University of the Third Age (U3A) in mainly British Commonwealth countries, is testimony to this phenomenon. Yet for all this positive growth, the reality is that outside of the mainstream middle class clientele of these educational institutions, there are still huge sub-populations of older adults who have been disenfranchised from formal learning opportunities and whose learning patterns we need to know more about.

Given that some people get to retire and some do not (financial need is usually at the root of this decision), it is arguable whether the concept of retirement itself is sustainable. In this age when increasing responsibility for financial security is thrown over to individuals rather than the State, and if neo-liberal policies persist, it is more likely that the new life pattern education-work-leisure identified by Riley and Riley (1994) will continue and become ascendant.

5.1.4 Learning for and in retirement

In his recent book *Learning in later life* (2001), Peter Jarvis writes of the need to “learn to retire” as well as that of “learning after retirement”. He describes retirement as incorporating ritual, especially if there is geographical separation of people – moving home from one state to another - and in terms of social networks. In contemporary secular societies, the ritualistic significance of a “leaving party” from a corporate environment or a “house-warming party” is often lost so that changes in social and work status can remain ambiguous. In addition, the transition from “worker” to “non-worker” may not be as pronounced as many older adults may

reduce their paid work commitment in favour of a fractional appointment or choose to undertake unpaid (voluntary) work.

During a period of study leave in the United Kingdom in 1999, I was fortunate to visit and be impressed by the Association for Pre-Retirement Education, an agency with no direct point of comparison in some other countries (e.g. New Zealand). This agency, while engaging occasionally with individuals in helping them to set goals for retirement, was more focussed on working with existing workplaces and assisting companies to more readily prepare employees for retirement. This work is laudable but there is nevertheless the challenge for the vast majority of workers in less caring environments to think constructively about what they will do with their third age. As in any other context for learning, the tendency has been for those people with better than average educational credentials to receive this kind of learning opportunity first (Pearce, 1991).

In terms of learning in retirement, Jarvis identifies the task of learning a new identity as primary. For some, this change in identity may be minimal – the person continues with many of the same work patterns as previously and does not move away from the local area. For others, the identity change is dramatic – a professional person one day; a person of (enforced) leisure the next. In this latter instance, the importance of setting realistic but challenging goals is high in order to avoid disillusionment. For many women, particularly those for whom domesticity has been the prevailing norm, the change of identity is virtually non-existent and the possibility of a male partner more often under foot can be threatening and anxiety provoking. Whatever the situation, older adults do not have to adopt predominant work and life patterns. In sociological terms, they have considerable *agency* and their identities are not necessarily pre-determined by prevailing social norms or stereotyping.

5.2 Cultural variations in responses to ageing

When on a visit to Malaysia in the late 1990s I was astounded to learn that a colleague with whom I was sharing a car was about to retire at the tender age of 55. He looked much too young and vibrant to give up paid work! The Malaysian Government requires that public servants “retire” at this age, presumably to allow for younger workers to enter the public service. The reality for the individual was not traumatic – retire from public service on the Friday; start in private practice on the Monday in a similar role. What this vignette alerted me to was the difference in the national outlooks and policies of our two respective countries. In New Zealand compulsory retirement was being abandoned; in the more “managed economy” of Malaysia, the State needed to intervene to try to ensure a greater distribution of paid work across ages.

In the above example, the concept of *culture* has been equated with national interests, though this is only one possible interpretation of what “cultural” might mean. In that same country, no doubt indigenous Malays, Chinese and Indian ethnic groups would understand the world differently though each group would probably revere elderly people more so than in the West. But as Blaikie (1999) has explained, it is too easy to argue that modernization has caused a diminution in the role and status of elderly in Western countries – “the roles and statuses of older people in the family, employment, and civil society more generally have always been multifaceted” (p.55).

If we interpret “cultural” to be “ethnic” differences in responses to aging, then these are undoubtedly significant. As an illustration, in the New Zealand scene with which I am most familiar, the worldviews of Pakeha (European) and Maori (indigenous peoples) are very different on many measures. The individualistic stance of most Europeans to any social issue contrasts with the collective, co-operative stance of most Maori. The case of aging is no exception. In a forthright article, Maaka (1993) analyses some of the salient differences. His observations include this generalization:

One of the more obvious differences between Pakeha and Maori aged...is that instead of slipping into quiet retirement many kaumatua become super-active and are busier than they have ever been in their whole lives (p.223).

Kaumatua is a generic term for older adults in traditional settings. While Maaka assumes the disengagement of most Pakeha, possibly an erroneous belief, the main point of his remark is to stress that in the Maori world, older adults tend to grow in stature as a result of aging. He links this to their enhanced responsibilities associated with leadership expectations. Older Maori are presumed to have considerable life experience which needs to be shared with the entire extended family. As Maaka (1993, p.222) explains:

No self-respecting Maori organization can operate effectively without its *tuaraa* (backbone) – its supporting kaumatua or group of kaumatua.

In effect, the roles of elderly Maori expand in range and importance so that their expertise can be shared with the collective.

In comparison, Pakeha society historically has tended to constrain rather than expand the duties of older adults (though, arguably, this trend is changing). Certainly, care for frail European elderly is more often arranged through a health provider than through family members (Green, 1993). Few Maori elders end up in rest homes because care of kaumatua would be seen as a direct family responsibility. Perhaps the only valid generalizations for Pakeha are that inherited models of relating to older adults were transplanted from the UK and elsewhere in Europe to New Zealand and some of these persist; that there is little recognition at a public level given to older people for what they do.

Undoubtedly, cultural differences between and within societies account for many different patterns of how older adults themselves behave and how people at large respond to them. One way practitioners can deal with this situation is to relate to others who have experienced such cultures first hand and to read critically about norms of particular ethnic groups. In short, practitioners need to adopt an active attitude to finding out more of cultural practices as well as reflecting on their own behaviors with older adults in varying cultural contexts.

6.0 Areas for future enquiry (research opportunities)

Questions raised in this paper need to be addressed by practitioners, researchers and policy developers in unison. Within the gamut of ‘older adults and learning’ there is a huge number of possible avenues for educational research and practice in various communities of learning. Some examples follow -

- understanding the process of ageing itself – its physiological, cultural, political, economic and social aspects;
- examining structures and methods of ageing – effects on behaviour

- sensitisation of the wider community to the needs of older adults;
- historical development of relevant legislation and social policy, both nationally and locally;
- changing patterns of learning as social structures change;
- investigating the impact of statutory provision to improve the quality of life for older adults;
- the role of paid work and volunteerism among older adults;
- issues faced by older adults and learning responses (e.g. new technology and its use by older people);
- retirement and its impact on older adults' lives and learning;
- training researchers and fostering professional competence for those who work with older adults or within older adult communities.

In short, there is much in front of us to understand about the ageing process and the possibilities for adult educators in enhancing the quality of life for older citizens.

Such questions are suggestive of ways forward for adult educators to contribute more actively to the quality of learning and quality of life to be enjoyed by older adults. We educators can certainly do more than what we do at present but we need to be ethical and sensitive in the manner in which we proceed.

Note: Extracts from a forthcoming book entitled *Learning Later*, written by the author, and to be published by Krieger Publishing in Malabar, Florida, have been included in this paper.

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