OLDER ADULTS AND LEARNING: A CRITIQUE OF PARTICIPATION AND PROVISION

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ABSTRACT

This paper examines the issues of educational participation and provision in relation to older adults, primarily in the New Zealand setting. Older adults' learning is initially described using adult education concepts and perspectives but this approach is found to lack in-depth analysis. Subsequently, using the political-economy perspective from within a critical gerontology paradigm, the author portrays older adults' learning in the fuller context of their social and material conditions.

INTRODUCTION

In the debates around 'lifelong learning' and 'the learning society', often particular sub-groups within society are rendered invisible by the generic character of the discourse. In this case, the situation of older adults' learning is examined, with a focus on who gets to participate and why. To a degree, the issue of differential participation in education is as true for this sector of society as for any other. I argue, however, that the traditional conceptions of participation from within the field of adult education are insufficient to describe the inequitable nature of older adults' participation in learning activities. Further, it is useful to analyse such inequalities from a more critical paradigm, that of 'critical gerontology', in which disparities in participation are explained in terms of the social and material conditions in which older adults engage in life.

Initially, I discuss the notion of lifelong learning and how older adults' learning relates to it. Next, I address the issue of who are older adults before discussing what older adult education philosophies have encompassed. Issues of older adults' educational participation and provision are highlighted – more particularly, who gets education, who supplies it, and why. These conventional approaches are not entirely satisfactory in explaining participation among older adults – hence, next I introduce the ideas of 'critical gerontology' and a 'political economy approach' as tools of analysis, providing examples from two areas of social stratification (social class and gender) in the New Zealand context to more fully explain older adults' (non)participation patterns.

THE CONCEPT OF LIFELONG LEARNING

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 Goff, 1982). Within adult education, the concept of lifelong learning has held a treasured place and its importance to society has largely been self-evident to adult educators. The Faure Report (1972) 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 democratising of the education system in the name of a learning society. For the purposes of this discussion, 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).

The three contexts for learning are described by Jarvis (1985, p.3) as follows:

- **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 institutionalized, chronologically graded and hierarchical educational system.

For virtually everyone the first category occurs incidentally in daily life with little conscious thought to the process. The work undertaken by Canadian Allen Tough (1971) 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. In particular, an analysis of working-class and minority-group learning projects would be especially useful.

The second category is one in which many older adults would engage. 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 U3A (University of the Third Age), learning activity is the primary task of members. In grandparent roles, too, older adults may relate to inter-generational programs which are significant for their learning.

The third category may consist of tertiary education providers such as universities, TAFE colleges and other environments in which there is a clear hierarchical structure, often related to credentialing systems 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 from their own schooling experiences (Pearce, 1991). Formal learning contexts sometimes evoke fear, performance anxiety, and expectations of passivity (Cross, 1981).

In this paper learning is used in its widest sense, synonymous with its informal character i.e., a process employed by individuals to acquire knowledge, skills, attitudes and aptitudes. My argument is concerned with a critique of education (or formalised, learning) and its accompanying structures and processes. Debates about issues of participation, while applicable to all forms of learning, are primarily targeted at formal learning (education), where older adults often have been disenfranchised.

WHO ARE OLDER ADULTS?

While there is a huge literature, especially in the USA, on older adults and educational gerontology, there is no definitive characteristic as to what differentiates a person described as an 'older adult'. While it may be true to say that "we are as old as we feel" there is, nevertheless, a reality that we face some physiological decline as we age which does impact on our daily lives (Beatty & Wolf, 1996). However, we do not have to agree with deficit explanations of ageing – those that depict older adults as decrepit, frail or physically and mentally wanting – a more active and positive image of older adulthood can be projected instead. Just as significant to older adults' well-being are personal and societal expectations of what might be appropriate behaviours for them – these can be enhancing or inhibitory.

So defining older adulthood has been problematic. Using chronological age is misleading and dangerous as a criterion because of cultural variations in the social construction of 'old age' and huge individual developmental variation within same-culture age groups. Neugarten (1976) has formulated a useful categorisation which differentiates between *young-old* (adults usually aged 55-65) and the *old-old* (aged 75-85) to distinguish between healthy, active older adults and those less active due to chronic and acute health conditions. Sheehy (1995) points out what seemingly older adults do now – Neugarten's young-old – are what middle-agers used to do. Many older adults are breaking away from previous social norms and developing their own. White, Kahn and Foner (1994) have termed this phenomenon of the tendency of social structures to not keep pace with the actual living patterns of older adults as *structural lag*. Contemporary Western societies are certainly much more complex now than those on which many social norms and structures were developed.

Laslett (1989) has identified four ages to describe the dominant periods in an individual's life. The *first age* is that of childhood and early socialisation in which a person is dependent on

others; the *second age* is that of adult maturity characterised by an individual's pursuit of career and financial gain. At this point, typically, people will be concerned with forming their own families and taking responsibility for others. In the *third age*, an individual usually exercises fuller autonomy in self-fulfilment, having been released from the trammels of the second age. Often a person can develop more cultural interests and seek enhanced life satisfaction. The *fourth age*, is one of final dependency, decrepitude and death. In this paper, the focus is on the third age together with a discussion of appropriate educational goals.

PHILOSOPHIES OF OLDER ADULT EDUCATION

Philosophical approaches have tended to draw on the same diverse traditions as the field of adult education. For example, Lowy and O'Connor (1986) have used the familiar typology of Elias and Merriams' (1980) five philosophies of adult education: liberalism, progressivism, behaviorism, radicalism, and humanism – and opted for the last-mentioned as the most appropriate for older adults. While they note that each philosophy has some relevance in explaining a rationale for older adult learning, they feel that humanism – with its emphasis on freedom, autonomy, individual growth and self-actualisation – is the most apposite. This focus on the expressive rather than the instrumental character of older adults' learning provides an optimistic view of human nature analogous to Laslett's romantic ideal of third age learning.

A familiar way for adult educators to determine appropriate strategies for educating older adults is the needs-based approach. Such approaches, while prevalent in adult education because of their emphasis of 'starting where the learner is at', are fraught with ethical questions (Benseman, 1980). For example, who should decide on older adults' needs? Usually, the older adults themselves, but are they always in the best positions to make these decisions, and what of other stakeholders' interests (e.g., family members; the state)?

A pioneer in studying the learning needs of older adults was McClusky (1974) who distinguished between different kinds of needs which could reasonably be met within the education:

- **coping** needs: adults engaged in physical fitness, economic self-sufficiency, basic education,
- **expressive** needs: adults taking part in activities for their own sake and not necessarily to achieve a goal,
- **contributive** needs: adults deciding how to be useful contributors to society,
- **influence** needs: adults becoming agents for social change.

Many programs organized by adult education agencies might be analysed according to which of these needs are prominent or which combination of these needs is relevant. While acknowledging the issue of who determines these needs is problematic, the reality of many mainstream providers is that there is a predominance of programs aligned to meeting coping needs and few which actually help older adults to exert self-determination. This comment is valid for most mainstream provision in adult education but is particularly noticeable in the older adult environment where dependency behaviour is expected by much of society (Koopman-Boyden, 1993).

ISSUES OF PARTICIPATION AND PROVISION FOR OLDER ADULTS

As already pointed out, Tough's conception of participation has been very much broader than most people have traditionally conceived of it. In most instances, participation in (older) adult education has been conceptualised in terms of engagement in more formalized learning activities.

Older adults' involvement in mainstream adult education has not been commensurate with their percentage of the population. In New Zealand, little hard evidence exists on the extent of older adult participation on a national basis. One international study – The International Adult Literacy Survey (IALS) – where 12 OECD countries were compared indicates that in the 56-65 age group (no older age group was surveyed) New Zealand has approximately 25 % participation and Australia 18%. It is known from the United Kingdom, though, that participation in formal learning institutions (e.g., universities, local education authorities) is negligible (Walker, 1990); there is no reason to doubt the wider applicability of this remark to other Western countries. An interesting exception in the British scene has been participation in the Open University (OU) where, in the mid 1980s, older adults constituted 4.5% of the total undergraduate population (90% of all older higher education students in Britain). This suggests that it is the mode of

distance learning which is the significant factor in their participation; recent popularity of SeniorNet provides additional evidence to support this claim.

In the recent policy document disseminated by the National Institute of Adult Continuing Education (NIACE) in the United Kingdom entitled Learning to Grow Older and Bolder (1999), participation of older adults was analyzed and the picture depicted above was confirmed. More specifically, Carlton & Soulsby cite Naomi Sargant's study, The Learning Divide, wherein a population sample of 4,755 older adults were asked about their efforts to consciously learn something. In this survey, learning activities were defined as "practising, studying or reading about something, as well as being taught ... whether at home, at work, or in a college, whether full-time, part-time or for a short period". It was found that:

> "...while more than 2 in 5 of the whole population over the age of 16 were currently learning, or had done so over the previous three years, only 1 in 4 of the 55 to 64 age cohort, 1 in 5 of the 65 to 74, and less than 1 in 7 of people over 75 did so" (Carlton & Soulsby, 1999, p.22).

The general observation that "participation in learning declines with age" (ibid.) needs to be tempered by knowledge of the type of activity and preferences of older adults for locally accessible learning opportunities. In the above study, the methodological issue of combining both formal and informal learning makes it difficult to interpret the significance of the statistics. However, this research does indicate that the participation levels of older adults, *in general*, are lower than one would expect across a normal cross-section of adults.

If we look at the types of people who generally avail themselves of adult and community education programs, the profile includes disproportionately high numbers of:

- those who have attended school more than an average amount of time and passed formal qualifications,
- women (although men tend to be a majority in more vocationally oriented courses),
- those under 40 years of age,
- Pakeha (European),
- those who have above average incomes,
- people who are in full-time work and most often in a white-collar occupation (Benseman, 1996).

People outside of this profile (which includes older adults) are typically marginalised in terms of access to education. For older adults, the historical time in which they were children at schools, is more than likely to heavily influence the extent of their 'disadvantage'. 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). (This aspect is discussed more fully later in this paper).

Barriers to learning for older adults

There have been many models developed to explain participation (e.g., Cross, 1981) and typologies to identify barriers to people's participation in learning activities. Darkenwald & Merriam's (1982, p.137) system of categorising such barriers has been often cited and will be used here. They describe the barriers as follows:

- **Situational** – these relate to an individual's life context at a particular time i.e., the realities of one's social and physical environment,
- **Institutional** – those erected by learning institutions or agencies that exclude or discourage certain groups of learners,
- **Informational** – institutional failure to communicate information on learning opportunities,
- **Psychosocial** (attitudinal or dispositional) – individually held beliefs, values, attitudes or perceptions that inhibit participation in organized learning activities.

For older adults, all levels of barriers may pertain, and for some individuals each category may have differential impact upon decision-making. In the case of *situational* barriers, disability may prevent people's adequate mobility or the need to use public transport may limit access; *institutional* barriers could include non user-friendly enrolment procedures, high fees, an inappropriate venue or unexciting methods of teaching and learning; *informational* barriers may include brochures printed in too small type and crammed formatting or a failure to display brochures in places which older adults frequent; *psychosocial* barriers could be a belief

in the adage "I'm too old to learn" or generalising from previous poor learning episodes to current programs.

Quite obviously, educators can do much to reduce or negate the effects of the above barriers. Some are not within educators' power to change in the short term. These types of barriers will require societal level changes in attitudes towards older adults, and in practices which discriminate against elders, including policies adopted by local and central government. This observation is reinforced by Walker (1990) in her analysis of participation: "The larger more intractable issues that form the real barriers, educational and class status, lack of self-esteem and power, require a more radical solution" (p.105).

What does education provision for older adults look like in Australasia?

As we might expect, the range of provision is enormous and generally mirrors the complexity found in other domains of adult education. Philosophical diversity is suggested by the framework of needs mentioned above – programs can be concerned with individual development and coping skills; or focusing on recreational and leisure pursuits; less often related to fostering vocational skills; still less frequently concerned with developing critical capacities to challenge the social order.

In general, there are at least four types of adult education organizations in terms of provision for older people as defined by Findsen (1999):

- those self-help agencies controlled by older adults to meet their own learning needs (e.g., U3A),
- those agencies which 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 centres 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).

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 have this group as their primary participant group. This is a reflection of the relative powerlessness of older adults in youth orientated cultures (Phillipson, 1998). However, there are certainly many mainstream providers who have provided a tokenistic level of support, but still more that have neglected their learning needs altogether. There is an immediate challenge here for raising the consciousness of such providers to their responsibilities of working with traditionally marginalised groups, inclusive of older adult sub-populations.

The above typology assumes that the organization has an *educational* role. The range of 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 several organizations which are concerned about the social issues facing older adults (e.g., Age Concern; City Councils; Grey Power; Help the Aged). While their primary goals may not be explicitly related to education, it is likely that education is a means by which they would want to achieve their goals. 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 social issues that affect older adults 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).

CRITICAL GERONTOLOGY

This approach, which questions the 'naturalness' of the concerns facing older adults, has several strands, three of which are explained by Phillipson (1998, pp.13-14):

- from political economy, there is an awareness of the structural constraints affecting older people, with divisions associated with class, gender and ethnicity being emphasized,
- from a humanistic and biographically-oriented gerontology, there is a concern for the absence of meaning in older people's lives and accompanying doubts and uncertainties,

- from several traditions, there is the issue of empowerment, whether through the transformation of society or the development of new symbols or rituals to facilitate individuals' change throughout the lifecourse.

Within critical gerontology, the political economy approach provides a useful framework from which to better understand the social and historical contexts of older adults' lives. In this perspective, older adults' access to education is couched in the social fabric and material conditions of their lives rather than viewed as an individualistic decision made in isolation from social context. From this viewpoint, the educational institutions themselves, as instruments of the government, are not exempt from political and ideological forces that may influence older adults' engagement with them. (Non)participation among older adults is viewed from a macro perspective related to cultural patterns and social dynamics in the surrounding society. This approach is encapsulated by Estes (1991, p.19) as follows: "The central challenge of the political economy of aging is to understand the character and significance of variations in the treatment of the aged and to relate them to broader societal trends."

In this way it is possible to understand the meaning and experience of old age via an analysis of the distribution of resources in society which in turn are directed by economic, political and socio-cultural forces. In addition, social policy for the aged (or more general social policy which has an impact on older adults) is also inextricably linked to these same material and ideological arrangements. Access and participation are examined not from the viewpoint of an individualistic decision-making process but from a sociological context of embedding individual actions in the fuller political and social environment.

AN EXPLANATION OF PARTICIPATION FROM A POLITICAL ECONOMY APPROACH

Space does not permit an extended discussion on how a political economy approach can help develop our understanding of older adults' participation in education. While it is common to analyse the role of the state and to investigate overlapping differential experiences of older adults according to class, gender and ethnicity (see Findsen, 2001, for a fuller explanation), I will restrict discussion here to two areas of social stratification – social class and gender.

Areas of social stratification:

Social Class

The impact of social class in New Zealand is probably not as pronounced as in traditional European societies, given this nation's early beginnings as a purported egalitarian society. However, the New Zealand 'classless society' has always been a myth rather than a reality, particularly in recent years as neo-liberal reforms have accelerated and the rich have become richer, and the poor, poorer (Kelsey, 1999). Yet in the absence of a class of gentry, the country has largely been one where people have aspired to private land/house ownership and have often achieved that goal. Fortunately, the percentage in New Zealand of people over 60 who own their own homes, without a mortgage, is high at over 80 percent (Thorns, 1993).

The structure of the labour force is changing, aligned to the government's desire to have an 'upskilled' workforce capable of competing internationally in the global marketplace. While agricultural products remain this country's major primary export, the services industries (e.g., tourism) have risen in importance. Hence, the nature of work itself is in flux. According to David 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. (This may be related to ageism in the marketplace). If a person is a member of a minority group such as Pacific Islanders, then the pathway of a career is very precarious indeed. Given that life expectancies are increasing, this leaves many people's lives in considerable uncertainty in the third age (Laslett, 1989). This is a harsher economic reality than the romanticised image of the third age so often projected by adult learning theorists. In addition, the New Zealand Government 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.

Gender

One of the truisms concerning the social construction of ageing is that it is a gendered phenomenon. Women and men experience the world differentially and, more typically than not, women are disadvantaged by patriarchal institutions in society, including those in New Zealand (Bonita, 1993). The education system is one such social institution where women predominate in terms of numbers of students but are fewer proportionately in positions of responsibility within academia (Thompson, 2000). With regard to older people in New Zealand, the number of women in comparison to men increases as age increases so that 'old' older adulthood has become remarkably feminised. The burden of care has typically fallen on women who now must find someone or the State to care for them (Arber & Ginn, 1995).

Women tend to predominate as 'returners' to education as mature-aged students (McGivney, 1996). In most instances, this is inspired by instrumental purposes as they attempt to get back into the workforce, but their choice of subjects (towards more helping and caring professions) tends to differ from men's (towards more technical, vocational opportunities). At the time of retirement for many men, some women find themselves as the primary breadwinner (though often in part-time positions). Phillipson (1998) depicts the dynamics around retirement as problematic – retirement has been more stereotypically perceived as a 'man's problem' in which he disengages from his major source of identity and status; this situation is not usually shared by women. The (post)modern world renders traditional views of retirement as rather archaic as retirement is currently clearly much more complex a process than it was previously (e.g., increasing demands on grandparents as caregivers when both parents work). In this situation, where the concept of retirement has become so slippery, the issues around pre-retirement education become much more challenging.

For many women there is a clustering in low-paid jobs with limited or non-existent pensions. The experiencing of 'retirement' may be very different for women whose income and quality of life may be attached to a husband's (Phillipson, 1998). And retirement from what? The vast majority of caring and volunteering work exercised by women is likely to continue, regardless of retirement. In contrast, it is foreseeable that those men who have retired from full-paid work will need to find volunteering work and/or learn more expressive roles as they enter older age or else enter what some have labelled a 'roleless' state.

While the two areas of social stratification has been presented separately in the above discussion, the obvious point to be made is that they interact and compound the situation for the marginalised, especially older people. For example, the situation of the white middle-class male from the city versus the Maori woman in a rural setting emphasises the differential experience of life and the considerable variation in treatment of older people in New Zealand society.

What are the implications of a political economy analysis?

In broad terms, I argue that the social and material conditions of older adults' lives vary considerably according to the political economy context i.e., according to social class, gender, ethnicity, and other factors such as geographical location (urban/rural), and levels of ability (or disability).

Quite clearly, there are implications for the state and educational institutions and for individual older adults. For the state, there is still a major role to play in the provision of public facilities and social welfare to ensure that different sub-populations of older adults are treated equitably. Educational policy in New Zealand and other countries needs to become more attuned to the ongoing learning needs of people throughout life and encourage older adults in particular to pursue education opportunities as a right. Older adults in many societies, despite negative stereotyping of their capabilities, still have leadership responsibilities for which adult education can function as a catalyst and mode of knowledge validation.

For education agencies, there is a major challenge to become more relevant to various sub-groups of older adults. For older people who have been professionals, the pathway back to formal education is not so rocky, given their earlier success in the system. However, for the marginalised groups such as Maori women in New Zealand, the pathway needs clearing, widening and repaving to accommodate their special learning propensities. As well as taking the institutions to the people, any outreach initiative undertaken by adult education institutions will need to take into account the social and material realities of specific sub-groups. Some initiatives have already been taken

by Maori (women) themselves to provide culturally-relevant curricula to their people via *whare wananga* (houses of higher learning). (In this instance, *kuia and kaumatua* – Maori women and men elders – play an important role in working with younger generations to preserve their common heritage). For other seemingly peripheral groups of older adults, more adventurous initiatives will need to be taken to attract their participation – groups such as older semi- and unskilled workers, Polynesian men and women, and rural dwellers will require flexible and imaginative strategies to make their participation more likely.

CONCLUSION

This paper has endeavoured to depict the situation of older adults' educational participation, primarily from a New Zealand perspective. Initially, I have concentrated upon drawing the picture of educational participation and provision from a more conventional approach, using concepts and perspectives from the field of adult education. Essentially, I argue that this orthodox approach, though helpful, is too restrictive as it does not encapsulate the actual (sometimes harsh) realities of older adults' lives in terms of their existential and material conditions. I proffer an alternative paradigm, emerging from critical geronotology, of which the political economy approach is a prominent subset, to suggest that understanding the differential opportunities open to different segments of the older adult population is a much more fruitful explanatory tool than typical adult education approaches. We, as adult educators or supporters of lifelong learning, need stronger analytical approaches to help us grasp the complexities of older adults' educational participation beyond what is superficially evident.

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