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2. LIFELONG LEARNING IN LATER LIFE

Policies and Practices

INTRODUCTION

Lifelong learning in later life has emerged as a decisive element in strategies advocating positive and active ageing (Formosa, 2012a). Suffice to remark that older adult learning has gained a constant presence in policy documents, ranging from international declarations such as the United Nations’ (2002) Madrid International Plan of Action on Ageing and the European Commission’s (2006) Adult Learning: It’s never late to learn, to national statements such as Malta’s National Strategic Policy for Active Ageing: Malta 2014-2020 (Parliamentary Secretariat for Rights of Persons with Disability and Active Ageing, 2013). It is believed that older adult learning allows citizens to remain healthy, independent and socially included as long as possible. As Schuller (2010) underlines, elder-learning is a necessary lubricant to keep a dynamo of opportunity and activity in the lives of older adults. This chapter commences by presenting an overview of older adult learning, followed by a commentary of European policy on late-life learning. Whilst the third section discusses what makes good practice in older adult education, the final section forwards possible future policies for late-life learning.

OLDER ADULT LEARNING

Older adult learning refers to the process in which older adults, “individually and in association with others, engage in direct encounter and then purposefully reflect upon, validate, transform, give personal meaning to and seek to integrate their ways of knowing” (Weil & McGill, cited in Mercken, 2010: 9). The key catalyst responsible for the rising demand and success of older adult learning constitutes the development of the ‘third age’ (Findsen & Formosa, 2011). The term was first born and conceived in the 1950s to counteract the stereotype of later life as a short period which is plagued by illness, invalidity, and in most cases, poverty. The ‘third age’ refers to a specific socio-demographic trend within population ageing. It alludes to how the combination of increased longevity and other social factors – ranging from earlier retirement, improving health status, establishment of the welfare institutions of retirement and pensions schemes, to more positive values and beliefs towards older persons – have opened up what could be loosely termed as a new phase in life, as the result of which persons spend a considerable amount of time in relative active years following exit from work. In such a scenario, older adult learning provides the opportunity to explore learning goals that people at
earlier stages of the life course are often too busy to pursue, such as developing a reflective mode of thinking, contemplating the meaning of life, coming to terms with one’s past as a preparation for death, and the quest for self-fulfilment and spiritual advancement. Russell (2008), for instance, painted a picture of third agers as facing a temporal kind of anxiety – that is, having a limited number of years left on one hand and a longer period of retirement on the other. She argues that this sets in a tension in their daily lives which induces them to search for and participate actively in meaningful learning projects. Similarly, Hodkinson and colleagues (2008: 179) claimed that the third age is characterized by an ongoing type of learning – that of becoming. Far from simply acquiring commodities such as skills, knowledge, or understanding, learning provides retirees with the opportunity to undergo a continuous process of personal construction and reconstruction.

Comparative data on participation rates are sporadic, and the few that exist tend to be ‘unreliable’ and ‘not comparable’ as they include different definitions of ‘non-formal’ and ‘informal’ learning (Percy & Frank, 2011). Yet, a literature review of the literature elicits three persistent findings. First, a lower percentage of elder learners compared to younger peers, with a sharp decline of participation as people reached their seventieth decade. In the United Kingdom, only one in five over 50s are ‘learners’, compared to two in five of the adult population, with the proportion falling to only 7 per cent of those aged 75 and over (McNair, 2012). On the other side of the Atlantic, most further education in Canada remains job-oriented, so that further education drops off rapidly to around 15 per cent or less of those over 65 (Livingstone & Raykov, 2013). However, the good news is that older adults spend nearly as much time on informal learning as middle-aged adults (Formosa, 2012b). Various propositions have been put forward to explain why participation declines with age, ranging from situational barriers (obstacles relating to the unique circumstances of later life), institutional barriers (unintended barriers that exclude subaltern and voluntary elders), informational (failure of agencies to communicate what learning are available), to psychosocial barriers (attitudinal beliefs and perceptions that inhibit older persons’ participation).

Second, typical learners are middle-class women so that the working classes, older men, and ethnic minorities are highly underrepresented. For instance, Finsden (2005) pointed out that given the multi-cultural environment of Australia and New Zealand, one would reasonably expect to see at least some Asian faces, plus those of Maori and Pasifika people, engaged in older adult learning. This is, however, not the case and memberships are heavily represented by members from the Anglo-Saxon community. Moreover, whilst most surveys on older adult learning uncover a positive women to men ratio – 3:1 in the United Kingdom and Malta (Midwinter, 1996; National Statistics Office, 2009), 4:1 percent in Australia (Hebestreit, 2006), and 2.5:1 percent in Spain (Alfageme, 2007) to mention some (Formosa, 2014) – the elitist character of some programmes (especially the University of the Third Age) is now well-documented (Formosa, 2000, 2007, 2012c). Indeed, although most programmes offer no hindrances to membership, many tend to pander “to the cultural pretentious of an aged bourgeoisie who had already learned to play the system” (Morris, 1984: 136).
And finally, how contemporary trends in older adult learning are experiencing significant changes. Taking the United Kingdom again as a case in point, while the proportion of people aged 50 and over who report that they are engaged in learning has not changed since 2005, the numbers learning at college or university have halved (from 21 per cent to 9 per cent in colleges and from 14 per cent to 8 per cent in universities), while the numbers learning online and independently have risen (McNair, 2002). Although the proportion of older people learning about ‘computing’ registered a dramatic drop, from over 40 per cent in 2005 to just 17 per cent in 2012, the number of older people using computers for learning increased, in that 12 per cent of those aged 50 and over are now ‘learning online’. The same trend was documented with respect to those reporting a preference to engage in informal learning, in that 16 per cent of people aged 50 and over reported to be learning ‘independently on my own’, and a further 9 per cent ‘independently with others’. It is noteworthy that for persons aged 75 and over the former figure rises to nearly 30 per cent of learners aged 75 and over, while the latter rises to 14 per cent (ibid.).

POLICY AND OLDER ADULT LEARNING

In recent years it has become virtually impossible to locate a policy document issued by the European Commission (EC) that makes no reference to lifelong learning. The European Union (EU) regards continuous learning through life as a comprehensive strategy to meet the requirements for a Single European Market and address the repercussions of increasing structural unemployment. Cognizant of the ageing of European society – due to falling birth rates, shrinking family sizes, fewer numbers of young people in the labour market, and increasing life expectancies – the EC (2006, 2007) issued policy directives on lifelong learning also advised formal and non-formal learning providers of education to plan and implement further educational opportunities for older adults. Indeed, the EU considers late-life learning as a positive investment on the basis that not only it engenders positive returns of economic growth but also improves the quality of life and social development of older persons.

Following the declaration of 1996 as the European Year of Lifelong Learning, the EC published vital policy documents on lifelong learning. Key publications include Memorandum on lifelong learning (2000) and Making a European area of lifelong learning a reality (2001: 33) where lifelong learning was defined as “all learning activities undertaken throughout life with the aim of improving knowledge, skills and competences within a personal, civic, social and/or employment related perspective”. Moreover, in June 2002 the European Council of Heads of State and Governments adopted a Resolution on lifelong learning, as the guiding principle for the reform of education and training in the member states, which argued that lifelong learning is an “indispensable means for promoting social cohesion, active citizenship, personal and professional fulfilment, adaptability and employability” (Commission of the European Communities, 2002: 1). Moreover, it was stated that lifelong learning “should enable all persons to
acquire the necessary knowledge to take part as active citizens in the knowledge society and the labour market” (ibid.).

Despite such promising developments, older persons were a late entry in policy documents as it was only in 2006 – some eleven years after the first policy document – that late-life learning was first mentioned. Although the argument remained entrenched in an employment perspective, in that it was posited that lifelong learning and access to training must provide older workers with the necessary skills to adapt to changes on the employment market remained constant, it was positive to note that Adult Learning: It is never too late to learn (2006) and Action plan on adult learning (2007) attempted at developing a more holistic approach to older adult learning. Stressing that the growing numbers of retirees in Europe should be regarded as a potential source of educators and trainers for adult learning, the former posited two objectives for lifelong learning as far as older adults are concerned:

[1] to ensure a longer working life, there is a need for up-skilling and increasing lifelong learning opportunities for older workers … [2] an expansion of learning provision for retired … the Commission invites universities to be more open to providing courses for students at a later stage of their life cycle. (EC, 2006: 8-9)

The Action Plan on Adult Learning (EC, 2007) reiterated the assumption that in a ‘knowledge-based’ and ‘ageing’ society, access to lifelong learning is a condition for both economic growth and social cohesion. However, despite calling upon Member States to ensure sufficient investment in the education of older people, it is disappointing that the document does not address the issue of late-life learning in any specific detail. As the following excerpt shows, the directive seeks to locate one solution for all subaltern citizens:

This Action Plan focuses on those who are disadvantaged because of their low literacy levels, inadequate work skills and/or skills for successful integration into society … these could include migrants, older people, women or persons with a disability. (EC, 2007: 3)

Although one welcomes the increasing attention levelled to older adults in current lifelong learning policies, literature highlights three crucial lacunae in such expositions (Formosa, 2012a). First, a neo-liberal construction of later life where ‘public issues’ are projected as ‘private troubles’. It is unrealistic to expect older persons to solve the contemporary problems linked with retirement when such issues surfaced only as the result of wider and structural predicaments. Hence, rationales for late-life learning remain incomplete unless they are framed in terms of a discussion of appropriate provision on behalf of the state for both active and excluded elders. This is because irrespective of older persons’ interests and yearning for learning opportunities, structural circumstances continue to impact greatly on the extent of participation in older adult learning. A general disinterest to participate in learning activities on behalf of non-typical learners does not suffice as a complete justification for their invisibility in learning programmes.
Second, constraining productive ageing solely to the sphere of paid employment. Albeit the goals of lifelong learning as premised by the European Commission also include inclusion, active citizenship, and personal development, nevertheless, the discourse linking ‘learning’ and ‘later life’ is biased towards the economic realm. Human experience is surrendered to the controls of the market, so that any notion of meaning detached from ‘work’ and not defined according to capitalist logic simply disappears. This stance is not surprising considering that from the very beginning the EC (2001) posited the need to expand lifelong education and learning in terms of the ‘competitive advantage’ that is ‘increasingly dependent on investment in human capital’, and on knowledge and competences becoming a ‘powerful engine for economic growth’. And finally, policies’ exclusion of older persons located in the fourth age. Even at a relatively young age, many older adults experience complications from strokes, diabetes, and neurological diseases. The range of cognitive limitations experienced in later life is substantial with, for instance, 9.95 million older adults suffering from dementia in Europe (Alzheimer Disease International, 2010). Indeed, some 8 per cent of persons aged over 65 in the European Union reside in long-term care settings (Rodrigues et al., 2012). It follows that, for lifelong learning to be really ‘lifelong’, learning opportunities should also be provided to occupants of residential and nursing homes, whilst also not overlook the learning needs and interest of frail elders whose mobility, sight, and/or hearing impairments restricts them from leaving their homes.

GOOD PRACTICE IN OLDER ADULT LEARNING

Following Mercken (2010), good practice in older adult learning is achieved by the adoption of four key principles – namely, empowerment, competence development, social participation, and integration – and the extent to which these principles are implemented in the learning process. In recent times, one notes the emergence and development of an alternative, optimistic, view of ageing – one that sees population ageing as an accomplishment, and which mitigates against the stereotypical assumption that older persons are generally dependent and in need of care. However, the establishment of a really ‘active ageing’ society can only be achieved if policy develops appropriate channels for social participation and involvement. Education, without doubt, is a key catalyst in this respect, and has immeasurable potential to help increase senior citizens’ ability to do things for themselves. In other words, older adult education and learning programmes can act as vehicles for higher levels of social and personal transformation:

When one learns something doors are opened and new possibilities present themselves. Teaching someone to use the Internet, for example, is more than simply passing on a skill. The ability to use the Internet empowers the student by giving him or her easy access to information … increases their self-confidence, reinforces their autonomy, helps them to remain active as long as possible … (Mercken, 2010: 54)
Although competence development is probably the most accepted goal of all forms of education, this is not always the case in older adult learning. This stems from the conjecture that older persons do not need new skills or knowledge, or that they will have no opportunity to use their new competencies, which is the chief reason why older workers are given less training opportunities when compared to younger peers. However, this presumption overlooks that learning is a **sine qua non** in a late modern society since, in order to keep up with all emergent developments, people – whatever their age – need to engage in constant learning. On a more positive level, social participation is one of the most visible elements of older adult learning, as many programme organisers are well aware of the potential of learning to improve community development and social cohesion, as well as international solidarity. Finally, the principle of inclusion promotes the idea that older persons should not be handled as a separate group but, instead, should be integrated in the community whilst, of course, ensuring that their specific needs and interests are met.

During the last decades, many programmes in older adult learning have proven their success by becoming very popular with older learners (Merchen, 2001). Most successful activities are those which offer learning opportunities that are ‘for older people by older people’, programmes that actively encourage senior citizens’ involvement. These range from Universities of the Third Age based upon the British model, pre-retirement learning programme in the Netherlands and Ireland, study circles, endeavours promoting active ageing through learning, and projects appointing senior citizens as experts. For instance, the ‘Chitalista’ of Bulgaria are a specific type of cultural and educational institutions which offer a wide range of educational activities and courses ranging from concerts and films, to foreign languages and music appreciation classes. Another promising venture is KAPI, an acronym for *Kentron Anikiti Prosthea* or Open Centres for the Elderly. There are approximately 300 of these community centres for people above the age of 60 in Greece, most of them in Athens:

> Although competence development is probably the most accepted goal of all forms Centre programmes vary depending on the interest of the members. Each centre also has a planning council supervised by the director. The council meets periodically to establish programmes, arrange financing, and publicise the programmes through a newsletter published by members. Generally, the programmes are social, educational and recreational in nature. (Mercken, 2010: 73)

Another successful programme is the Universities for Older People in Italy, numbering approximately 1,000 centres, and which provide learning programmes without any forms of certification. The most popular courses are literacy and language courses, with the most attended being those about ceramics, restoration, painting, sculpture, mosaics, glasswork, and arts in general. The Dutch Senior Citizen’s Association are also noteworthy. Besides acting as lobbyists for older people, the associations also develop a wide range of cultural, sport and recreational activities and services for their members, including non-formal education (Mercken, 2010). At the same time, one notes a number of projects for
older learners living in rural communities. For instance, the Department of Continuing Education at Lancaster University operated an innovative Learning from Home programme that enabled groups of adults, many of whom were older people living in rural areas, to engage in learning through telephone conferencing (Withnall, 2010). Another success story is Stories of Our Age – coordinated by the Workers Educational Association Northern Ireland and Age Northern Ireland (2011) – which sought to provide older people living rurally with an opportunity of having their voices heard on issues affecting them as they grew older, and to offer them the chance to develop some new skills using digital technology.

The above programmes demonstrate that older adult learning should be credited for providing an opportunity for older adults to participate in lifelong learning, and therefore, contributing strongly towards the ongoing construction of societies where people age positively, and providing opportunities to a sector of the population that is generally left out in the cold as far as learning is concerned. Late-life learning also militates against the widespread stereotypes of older persons as a needy and dependent group, as passive takers and recipients of pensions and welfare services. Admittedly, at present one locates no rigorous research programme investigating the relationship between older adult learning on one hand, and improvement in physical and cognitive well-being on the other. It remains, however, that there are many valid and reliable studies showing how continued mental stimulation in later life aids learners to, at least, maintain their physical and cognitive health status (Cohen, 2006; National Seniors Australia, 2010). Moreover, Wrosch and Schulz’s (2008) findings that older adults who were proactive and persistent in countering health problems experienced greater physical and mental health benefits augurs well, since most elder-learning programmes offer various courses on health promotion and illness prevention.

FUTURE POLICY DIRECTIONS

In view of the fact that older adult learning is fastest growing category of lifelong learning, there is an urgent need for more intensive policy on late-life learning. It is augured that policy directives are guided by a rational that reinstates lifelong learning in the values of social levelling, social cohesion, and social justice (Faure, 1972). Only so will it become possible for late-life education to prioritise the ‘democratic-citizen’ over the ‘future worker-citizen’ as the prime asset of post-industrial societies (Lister, 2003). National policies on lifelong learning that tackle the issue of late-life learning should be promulgated so as to respond to older adults that remain educationally excluded and socially disadvantaged. At the same time, providers must think out of the box so that late-life learning initiatives attract older adults with working class backgrounds, ethnic minorities, older men, elders in living in rural regions, and housebound elders. There must also be serious attempts in outreach work which facilitate learning opportunities outside formal settings with older adults who could or would not usually participate in traditional formally organised provision, with the teaching of ICT and e-learning strategies comprising a central priority to such an effect.
At a community level, local authorities should take on a more explicit role and responsibility in the planning, coordination and financing of late-life learning. In partnership with third sector agencies, local authorities should take the role of learning hubs that bring all the “providers (public, private, and voluntary together) together, to coordinate resources … and promote learning among older people” (McNair, 2009: 17). Moreover, there should be an awareness that the educational system that spends some 18 years, and substantial financial capital, to prepare citizens for the world of work, but simply a couple of afternoons to leave it, is clearly biased against older persons. Society has an obligation towards its citizens to provide them with learning initiative that help them plan for their third and fourth ages. It is noteworthy that a really democratic pre-retirement education is not simply instruction about the formalities surrounding pensions, the drawing of wills, and health. It is one which also includes a discussion of psychological and social strategies that lead older adults to improve their quality of life. Moreover, local authorities should recognise the empowering benefits of coordinating educational activities that link older adults with children, teenagers, adults, and even much older peers and coordinate educational initiatives that increase cooperation, interaction, or exchange between different generations.

The amalgamation of state and community efforts in improving the state of older adult learning in the European context – whether in formal, non-formal or informal avenues – lead to the following policy priorities for the future:

**Widening participation.** Responding to older adults that remain educationally and socially disadvantaged necessitates a ‘widening participation’ agenda. Providers must think out of the box so that late-life learning initiatives attract older adults with working class backgrounds, older men, elders in living in rural regions, and housebound elders. There must be serious attempts in outreach work to facilitate learning opportunities outside formal settings with older adults who could or would not usually participate in traditional formally organised provision. Without doubt, the teaching of ICT and e-learning strategies comprise a central priority on a ‘widening participation’ agenda.

**Higher education.** There is a need for the higher education sector to play a key role in encouraging new types of adult learning through all phases of the life course. In addition to employment-related programmes that support older people moving from full-time employment to various forms of work, higher education must also provide ‘personal development’ programmes which identify new types of courses and markets among a diverse and segmented post-50s market, and ‘health and social care’ programmes orientated to professionals working with older people that vary from foundation degrees through to modules for continuing professional development (Philipson & Ogg, 2010).

**Productive ageing.** There is a need for learning initiatives for employment, both for those still in or seeking paid work, while latching upon European Union-funded programmes. Emphasis must go beyond simply the provision of courses leading to formal qualification, and also include initiatives that update skills and knowledge, and adopt previous experience to new contexts (McNair, 2009). Programmes must
be sensitive to gender differences in or finding work, as well as respect the choice of those who may still want to embrace a ‘culture of retirement’ even if it means a ‘trade-off’ with a lower standard of living.

**Pre-retirement education.** The educational system that spends some 18 years, and substantial financial capital, to prepare citizens for the world of work, but simply a couple of afternoons to leave it, is clearly biased against older persons. Society has an obligation toward its citizens to provide them with learning initiative that help them plan for their third and fourth ages. It is noteworthy that a really democratic pre-retirement education is not simply instruction about the formalities surrounding pensions, the drawing of wills, and health. It is one which also includes a discussion of psychological and social strategies that lead older adults to improve their quality of life.

**Fourth age learning.** Learning initiatives should be made available to family relatives and volunteers involved in the care of older persons. Such programmes are to focus on the dynamics of sensing the feeling of older persons and perspectives, taking an interest in caring outcomes, empowering older adults’ development and strengthening their abilities, cultivating opportunities for diverse people, and anticipating, recognising, and meeting the needs of the person under care. At the same time, there is an urgent need to support learning initiatives in care homes so that all older persons, even those suffering from confusion or dementia, have an opportunity to participate in learning opportunities.

**CONCLUSION**

As European’s population continues to witness higher numbers of older persons, the development of older adult learning will have far more serious implications to establish active ageing societies. Indeed, late-life learning enables older people to adjust to rapid social changes, as well as helping them to achieve higher levels of social and personal empowerment. Older adult learning also has the potential to combat ageism and social exclusion. However, for older adult learning to really contribute to such changes “it is not only the technical skills that need to be continually refreshed, not only the job-focused education that needs to be lifelong” but “the same is required, and with greater urgency, by education in citizenship” (Bauman, 2005: 126 – italics in original). Unfortunately, whilst most policies for older adult learning are characterised by a sense of urgency to keep up the rapid ‘technological process’, limited exigency is located “when it comes to catching up with the impetuous stream of political developments and the fast changing rules of the political game” (ibid.). This lacuna may be overturned if policy and good practices in older adult education move in parallel, whilst keeping each other informed of positive developments. Such a direction has immense potential to construct a more holistic approach to late-life learning, one that is sensitive both to the heterogeneous character of older cohorts as well as the diverse meanings that the act of learning has for different persons. Indeed, the linkage of policy and practice allows “a better understanding of the ways in which older people learn,
whether and how they differ from those used by younger people and if so, how their learning could be enhanced” (Withnall, 2008: 3). Addressing such concerns “would enable us to move towards a more inclusive society where all forms of learning are valued, older people are held in higher esteem for the contribution they make, and learning for everyone is truly acknowledged as a desirable lifelong process” (ibid.).

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