Older people's learning:
an action plan

A NIACE policy paper, by Stephen McNair

So we attach a high priority to the challenges posed by our ageing society. I believe it is as important as maintaining a strong economy, fighting terrorism or dealing with global warming.

Mike O'Brien, Minster of State for Pensions Reform (June 2008)

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NIACE has a broad remit to promote lifelong learning opportunities for adults. NIACE works to develop increased participation in education and training, particularly for those who do not have easy access because of class, gender, age, race, language and culture, learning difficulties or disabilities, or insufficient financial resources.

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Foreword

1 A key moment in the development of learning for older people

In the last few years some educational opportunities for older people have been cut back. However, when we look back, we may realise that the first months of 2009 were a turning point. This paper is about how future developments might be shaped, to make sure that older people get the chances that they want and need, to learn.

Government has identified an ageing society as one of the major challenges facing society. Awareness is rising in the media and the general public, and five Government initiatives now in progress will set the national policy framework for some years to come. At the same time, we have had a series of significant research and policy reports, and Spring 2009 sees the creation of a new major voluntary organisation created by the merger of Age Concern England and Help the Aged.

As these separate initiatives develop, it is important that they help achieve three objectives:

- That all older people have access to opportunities to learn the things they want and need to learn, through programmes of education and training which individuals choose to take part in, to develop interests skills, knowledge and understanding. In England, the national policy responsibility for such learning lies with the Department for Innovation, Universities and Skills (DIUS), although many courses are managed and organised independently through private and voluntary agencies.

- That lifelong learning supports broader Government policy for older people, where the learning is a tool to achieve purposes like improved health or financial independence. Policy responsibility here lies with a range of other departments, for whom learning is secondary to particular policy objectives.

- That learning needs of older people are not accidentally damaged by policy decisions in other fields. Most of the changes in education for older people in recent years have been accidental, caused by the impact of policy in other areas, and a failure to see learning as an element of broader ageing strategy.

What do we mean by "older"?

There is no commonly agreed definition of "older", and different people age at very different rates. In this paper we are thinking of people over 50, which is the beginning of what is generally seen as the "third age" of life. By the mid 50s, for most people, retirement is beginning to be a real prospect, age discrimination in the labour market is beginning to take hold, and those with health difficulties are beginning to leave the workforce.

For most, though not all, people, the third age is no longer a period of ill health, isolation and poverty. Rather it is 20 or more years of healthy active "retirement". It is followed by a "fourth age" where people are dependent on others for some aspects of everyday life. However, individuals differ enormously: some people enter the third age earlier or later (and some people are still in paid work into their 90s). Similarly, health problems drive some people into dependency in their 50s, while others continue to live entirely independently to 100 and beyond. Despite popular images, most people never develop dementia and most never go into residential care.

Although this paper is about older learners, we are not calling for separate educational opportunities for older people. Many of the issues discussed here are relevant to people of all ages[1], and there is a good case for adopting an "age blind" approach to lifelong learning wherever possible. However, in the past, this approach has sometimes meant that the particular needs of older people have been overlooked. If no-one is asking about how a policy might affect older people, they may get forgotten altogether (thus, for example, employment policy generally ignores the later stages of working life, while care policy often ignores the learning needs of clients). What we propose here is not separate provision (though sometimes that may be appropriate), but that frameworks and policies should be in place to ensure that the learning needs of older people are being met.

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1   Young adults in particular often experience the same kind of discrimination as older people.

2 What is happening to learning for older people?

Older people learn in two different contexts: informal and formal. Much adult learning happens informally, without any support from Government, and without any kind of formal organisation or planning. People learn on their own, at home with friends, in clubs and societies, voluntary organisations and religious groups and in the workplace. It is important that such learning happens, and is encouraged, where appropriate, by sympathetic policies on the part of national and local Government, but that Government should not interfere in the running of independent organisations.

However, a large volume of learning is more formal, provided for or supported by Government, mainly through the Learning and Skills Council (LSC). Furthermore, decisions which Government makes about what it will and will not provide, can affect the demand for private and voluntary services.

There are, therefore, two different ways of measuring older peoples' participation in learning. On the formal side, where people enrol on courses, it is possible to count enrolments. On the informal side, we depend on surveys which ask individuals about their learning activities, which will include formal courses, but also the whole range of informal learning. Not surprisingly, these tell rather different stories.

To take formal enrolments first: between 1997 and 2003 the numbers of older people enrolled on publicly funded further education[2] programmes grew steadily. However, in 2003 this process went abruptly into reverse. In the three years from 2003, enrolments by people over 60 fell by 58% (to 164,000). By comparison, numbers of learners in the 19-59 age group fell less steeply (by 38%), and the number of learners under 19 actually grew, by 9%[3]. This was not an active decision by Government to reduce provision for older people: rather it was the consequence of a policy to guarantee provision for under 19s, and to give priority to basic skills and vocational qualifications. The result was a shift of resources in Colleges and Local Authority provision from part-time to full-time programmes, and from non-qualification to qualification bearing courses. Older people, who were overwhelmingly concentrated in part-time and non qualification bearing courses, saw fees rise and courses closed to make way for the new priority groups.

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2   Including all forms of further education (including Adult and Community Learning FE Colleges, and Workbased learning)

3   Figures from LSC Statistical First Release Reports: http://www.lsc.gov.uk/providers/Data/statistics/sfr/

However, NIACE's survey of adult learning tells a rather different story. Each year NIACE asks a sample of the population at large (learners and non-learners) about all forms of learning (including private study at home). This shows a much smaller decline in learning, and suggests that many people have moved from Government subsidised courses in Colleges and Adult Education Centres into private or voluntary activities. Certainly we have seen a rapid growth in membership of U3A, which is probably the biggest voluntary provider of informal learning for older people.

It is clear, then, that interest in learning has not declined, and the number of people learning has not reduced as fast as the numbers in state funded classes. However, less of it is being supported or controlled by Government. This change is not necessarily a change for the worse, indeed in some cases we may now have more relevant and accessible opportunities. However, it will be a problem if these changes make it more difficult for some people to take part, if the quality declines, or the new ways of organising prove unsustainable over the long term.

3 Government has five key current initiatives

The news ought to be good. We are all living longer, life expectancy has been rising now for over a century, and recent years have seen great improvements in the lives of older people. It is no longer true that older people in general are poorer than younger ones. Most of our extended lifespan is spent in relatively good health, and most of us spend our retirement living independent lives in our own homes. However, this does not mean that policymakers can ignore the many older people who are poor, isolated and in poor health.

Government is keen to improve the quality of life of older people, but must also make efficient use of taxpayers' money. It has recognised that major policy changes are needed in response to an ageing society, and at the beginning of 2009 there are five initiatives in progress.

The framework of Public Sector Agreements

The refreshing of the Opportunity Age strategy

The review of informal adult learning

The Equality Bill

The review of older people's engagement

The Public Sector Agreements

The framework for Government policy, across all Departments is laid down in a set of 30 national Public Sector Agreements (PSAs). Each of the Agreements sets a broad objective, and is accompanied by a set of measurable targets. Each is allocated to a lead Government Department, which is accountable for progress towards the targets, but all branches of national and local government are expected to contribute.

Six of the 30 Agreements have a direct bearing on older peoples' learning. They are:

PSA Number	Objective
2	Improve the skills of the population, on the way to ensuring a world-class skills base by 2020
8	Maximise employment opportunity for all
15	Address the disadvantage that individuals experience because of their gender, race, disability, age, sexual orientation, religion or belief
17	Tackle poverty and promote greater independence and wellbeing in later life
18	Promote better health and wellbeing for all
21	Build more cohesive, empowered and active communities

(Targets for these PSAs are detailed in Annex 1)

The "refreshing" of the Opportunity Age strategy

In 2005 the Government published its White Paper, *Opportunity Age: meeting the challenges of ageing in the 21st century*. This laid out plans for the development and coordination of policy on ageing across all areas of Government. It made proposals for action over discrimination, social care, cultural change, employment, and active ageing, among other things. It announced arrangements for coordinating work at national level, and a strategic role for Local Authorities.

In 2008, Government decided that it was time to review progress, and published *Preparing for our Ageing Society: a Discussion Paper*, in January 2009. This lays out the policy questions which Ministers see as critical to future policy on ageing, grouped under four headings, each of which has potential implications for lifelong learning, as the table below shows.

The "refreshing" is expected to lead to a new White Paper in 2009. The table below lists the four headings, and identifies the potential implications for learning:

Topic	Policy objectives	Issues
Building an age friendly society	Abolish age discrimination and stereotyping in access to education and training.	Although policy has not aimed to discriminate, publicly funded learning provision for older people has been damaged by the effects of a learning policy focused on younger people, and vocational programmes.
Preparing for later life	Expand pre-retirement/mid-life education. Develop and expand health and financial education.	There is little pre-retirement education, and what there is, is mainly available to people in senior managerial roles or in the public sector. Health education is only loosely connected to other forms of adult learning. Financial education is uneven and underdeveloped.

Living well	Maintain people's skills for paid and unpaid work and life.	Learning for life outside paid employment is underdeveloped. A particular need is to ensure that older people can make confident use of information technologies to keep in touch with others, and to take advantage of online services which can help overcome isolation and the impact of disability.
	Help people to remain socially engaged.	Because public adult education has been shrinking, the opportunities for people to meet others, and especially to meet people unlike themselves through attending courses, have been reduced..
	Help people to be more effective carers.	Although the number of people caring for partners and older relatives is growing, there is only limited learning support to help people to take on these roles.
Stronger protection and support	Maintain people's physical and mental health.	Although there are some very good learning programmes for people in the "fourth age", provision is very patchy, and often disrupted by the practical problems of managing homes, and of delivering care.
	Help people to exercise their rights and maintain independence.	The learning needs of older people are rarely addressed in social care policy.
		Older people are rarely encouraged to use personalised budgets for learning.

(www.dwp.gov.uk/opportunity_age/preparing/ageingstrategy.pdf)

The Learning Revolution: the review of Informal Adult Learning (IAL)

In 2008 the Secretary of State for Innovation, Universities and Skills launched a consultation about the future of "informal adult learning" (broadly those kinds of learning which do not lead to formal qualifications, including learning in the voluntary sector). The aim was to find ways of supporting increased learning against a background of limited public resources, through imaginative approaches to funding, partnership and technology. The 2008 consultative paper, *Informal Adult Learning – shaping the way ahead,* generated 5500 responses and further feedback through consultative events.

The resulting White Paper, *The Learning Revolution,* was published in March 2009. It proposes action on four fronts:

Building a culture of learning

- The launch of an *Informal Learning Pledge* where public and private sector organisations commit themselves to supporting and promoting informal learning

- The creation of a new *Festival of Learning* to promote and celebrate informal learning

- An *Open Space Movement* to improve access to public and private buildings for learning, including self help learning groups

- A *Transformation Fund* of £20M to support innovative approaches to informal learning

Increasing access to informal learning

- National support for a network of *Community Learning Champions*

- Joining up with the new Government Ageing Strategy (the "refreshing" of *Opportunity Age*)

- Encouragement to employers to support informal learning

Transforming the way people learn through technology

- A network of *Digital Mentors* to support learning with technology, including links to the implementation of the *Digital Britain* policy.

- A new *Web Portal* to make information about informal learning more accessible

- A *Broadcasting Forum* to make it easier to use broadcast materials for learning

Implementation

- A lead role for Local Authorities

- A review of provision for *Information and Communication Technology* (ICT) learning

- Continued *"ring fenced" funding* (£120m) for informal learning and support for specialist adult colleges and Union Learning

Specific initiatives affecting older learners include:

- Work to *"join up"* the informal learning strategy with the new cross Government age strategy

- Extending and promoting *pre-retirement education*, including online resources

- Better targeted information for older people on what is available

- Encouragement to providers to use the discretion in the Age Discrimination Regulations to continue to offer *fee concessions* to older people

- Improve learning provision for people in residential care

- The proposed review of ICT learning is particularly important because older people are much less likely than other people to have access to digital technologies and the skills to use them

(www.dius.gov.uk/skills/engaging_learners/informal_adult_learning/white_paper.aspx)

The Equality Bill

Government plans to introduce the Single Equality Bill in the present Parliament. Discussions are in progress on how the age discrimination can be outlawed in relation to goods and services, while retaining desirable age related policies (like transport concessions) which help overcome the disadvantages which older people experience. The extension of the law to goods and services is important because the current law is unclear about how far adult education fee concessions are legal under the current Age Regulations.

(www.equalities.gov.uk/equality_bill.aspx)

Empowering engagement: a stronger voice for older people

In 2008 Government commissioned an independent review of the engagement of older people in public policy and decisions about their lives from John Elbourne, who published his report in November 2008. This included a review of the role and future of the Better Government for Older People initiative.

In January 2009 Government responded with *Empowering Engagement: a stronger voice for older people*. This announced the intention to create a UK Advisory Forum for Older People, supported by civil servants, and a greater role for regional government offices in promoting older people's engagement through local Older People's Advisory Groups. The underlying objective is to ensure that the voices of older people are heard in the shaping of public policy. Lifelong learning has a potential role to play through a revival of civic education – to encourage and enable people to understand, debate and shape public policy. However, civic education of this kind has been in decline for a long time and reviving it will require active intervention.

(www.dwp.gov.uk/resourcecentre/empowering-engagement-stronger-voice-older-people.pdf)

4 What have we learned from recent research and development work?

In the last few years, a number of important research studies with implications for older people's learning have been produced (listed in full in Annex 3). Some key findings from these studies include:

- "Older people" are not a single homogenous group. Most older people resent being labelled "old", and the stereotypes of dependency which go with the label. Common definitions of "old" include people born anywhere between 1900 and 1950, and their learning needs are as diverse as those of any other age group.

- Adult learning brings significant benefits in health and wellbeing and economic productivity at all ages. (the Foresight report)

- Participation in learning of any kind increases the chances that an individual will continue to learn, building their independence and their social networks. (summarised in NIACE's Older People Learning report)

- The main "barriers" to participation in lifelong learning are about attitudes, not physical access: many people simply do not see learning as relevant to their needs. (DIUS market segmentation report)

- Older people do not, as a group, need or want to be taught in a different way from young people. Many would prefer to do their learning in mixed age groups, where they can feel part of a wider community. Problems are much more likely to arise because people are disabled than because they are old[4]. (NIACE/DIUS study on Pedagogy)

- Local Authorities have a key role to play in making sure that appropriate learning opportunities exist at local level, as part of broader strategies for responding to their ageing populations. However, many are not doing enough. At present there are few incentives for them to do more, and many do not adopt a strategic approach to all the needs of older people in their areas. (Audit Commission)

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4 Of course, the older people are, the more likely they are to be disabled, but the needs of people with hearing difficulties or in wheelchairs are common whatever their age.

- Employment is good for the health, happiness and prosperity of most people in their 50s and 60s, and people should be encouraged to stay longer in work. It is important to intervene quickly to help older people to get back into work when they become redundant, and to overcome discrimination, to ensure that they do not drop out permanently. (Black report)

- Older people generally have lower levels of literacy and numeracy, but most do not perceive this as a problem. (NIACE/DIUS report on Language, Literacy and Numeracy)

- Older workers and their employers actively welcome, and benefit from, careers guidance, but rarely receive it. (ReGrow report)

- Although many people believe that older people would be more employable if they had more training, there is little evidence on the link between employability and training for older people. What evidence exists suggest that employers and older employees value most highly short intensive training, aimed at very particular skills, rather than longer, qualification bearing courses. (CROW/DfES review of literature on learning and employability of older people, ReGrow evaluation report)

- Those who finish their initial education later (especially by staying on into higher education) are likely to have better health and wellbeing in later life. It is not clear whether participation in learning during adult life can enable early leavers to "catch up". (English Longitudinal Study of Ageing Wave 3)

5 What range of learning opportunities do older people need?

Older people will choose to learn many things. Some are Government priorities, and some personal interests. No-one can force adults to learn particular things, and they will only take part if they see the relevance of what is offered to their particular needs or interests.

However, people can only choose from what is offered, and if important things are not offered, they will not be demanded (or not by enough people to make providing them cost effective). It is therefore important that in every area there is a wide range of opportunities, and that some key topics are available to all.

At present, the range of available opportunities is dictated by three things:

- particular Government objectives, like improving diet or safety;

- the requirements of their employers (for those in work);

- what adult education providers can persuade people to pay for (which tends to reflect what has traditionally been offered).

The result is an uneven and uncoordinated range of opportunities which often fail to meet important needs, or only meet them for some groups and in some places.

Defining a framework of kinds of learning which older people might want or need would make it possible to:

- identify and fill gaps in current provision;

- monitor how far opportunities to learn are available and accessible to everyone;

- make it easier for providers to learn from each other, to improve quality and relevance.

A framework is important since some important needs will never be "demanded", because:

- individuals may not want to admit to needs, like loneliness or reading difficulties, which learning can help with;

- individuals may not perceive, or fully understand, their learning needs, or they lack confidence that anyone can help;

- government has objectives like improving social cohesion, or health, which people can be persuaded to join in, but will not ask for (or be prepared to pay for).

For example, many older people join adult education courses to make friends and overcome loneliness, but many would not choose to admit this, and few courses are advertised like this. Others simply enjoy the satisfaction of taking on a challenge and learning something new. Yet others come to study literature or history in order to make sense of their own lives and identities. Whatever the subject, courses which bring a variety of people from a neighbourhood together to pursue a shared interest have the effect of strengthening informal social connections, and thus building the "social capital" which increases trust and mutual support within communities. Other courses have the effect of reducing health expenditure, but no-one joins a class in yoga or pilates to save the NHS money.

A framework should therefore include both the subjects which people will ask for, and those which they may need, but not demand. To enable policymakers and planners to understand this, a variety of models have been developed for describing the purposes of lifelong learning. Two relevant ones are:

● The **"Four Pillars"** of lifelong learning, developed in 1996 by UNESCO.[5] This identifies the purposes of learning as learning "to know", "to do", "to live together" and "to be". This has been adopted in the *Learning Revolution* White Paper.

● The **"Three Capitals"** model being considered by the national Commission of Inquiry into the Future of Lifelong Learning.[6] This sees lifelong learning as a way of building three things:

  ● Self esteem, independence, purpose and meaning ("identity capital")

  ● The ability to contribute to the economy ("human capital");

  ● The ability to contribute actively to society ("social capital")

These two models are described in more detail in Annex 2.

The following framework is based on models developed by Help the Aged and by the National Inquiry into Lifelong Learning. What we propose is that all older people should have access to learning for each of the topics identified, at appropriate time, places and stages of their lives. Programmes and courses may be provided by public, private or voluntary agencies, and people may choose to learn face to face in a classroom, workshop or gym, by distance learning, by online courses, or private study. No-one should be forced to learn anything, but equally, no-one should be unable to learn these things because nobody has decided to offer them.

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5 UNESCO (1996) *The Treasure Within,* Paris (known as the "Delors Report", after its Chairman)

6 An independent Inquiry sponsored by NIACE to produce proposals for the future of lifelong learning over the next 20 years. Due to report in Summer 2009.

Topic	Objective	Current provision	Issues
Health	To ensure that people understand how to maintain their physical and mental health, and have the tools to apply that understanding.	Currently led by DoH and by some Local Authority Leisure Services or Adult Education Departments.	Very patchy provision. Depends on local policies and the interests and enthusiasm of particular staff.
Finance	To ensure that people understand and can manage their personal finances, and avoid financial abuse in later life.	Currently led by the Financial Services industry.	Very uneven availability. Great diversity of needs – from how to manage complex investments to how to budget on the State Pension.
Citizenship	To ensure that people are encouraged and supported to play an active role in their communities.	This is an element of some community regeneration programmes. Some elements are included in family education programmes, WEA and occasional local authority courses.	Very uneven availability. Rarely targeted at older people.
Information and communication technologies	To enable older people to "keep up" with younger generations in the use of key technologies. To enable older people to use ICTs effectively to maintain independence and social networks LSC/FE programmes.	LSC/FE programmes. Local authority adult education/libraries. Third sector agencies.	A lot of provision but uneven demand. This is the largest single area of participation by older people in formal learning.
Caring	To enable people to manage their responsibilities for caring for older people, and to provide personal support in managing the pressures of such roles.	Social services departments. Health authorities.	Little provision, rests with Social Care agencies.
Employability (for paid and unpaid work)	To encourage and enable people to extend their working lives, and to improve the quality of those lives.	LSC and HEFCE funded vocational programmes. Private sector training providers. Employer led workplace learning.	Extensive provision exists, but it is rarely (if ever) adapted to older peoples' needs.

6 What should be the priorities for public policy?

Access to learning throughout life should be seen as a human right, and making sure that older people have opportunities to learn should be an important objective of Government policy (whether the learning is supported directly by Government or not). With most people spending much longer in relatively healthy and independent "retirement" of some form, we need a public policy which looks at learning for life, beyond just employment and extending working life, and the health and social care issues of later old age.

Learning helps people to respond positively to change in their environment and circumstances, to remain engaged in society, and to remain physically and mentally active. Older people who do participate say that they enjoy it, and that it is an important part of their lives. Investment in learning for older people can also reduce the costs of medical and social care, and improve the quality of life of older people, their families and communities.

The following broad priorities emerge from the various documents reviewed in this paper:

- To **recognise the diversity of older people** and their needs and aspirations. People do not become more alike as they age;

- To **challenge stereotypes of ageing** which associate it with dependency and physical and psychological decline. Most older people are living independently in reasonable health;

- To **maximise participation in learning** by all older people, while addressing the specific disadvantages experienced by particular groups. Everyone can benefit from learning, and while some people have more urgent particular needs, the broad public interest is not served by creating a service only for the disadvantaged;

- To **help people to stay in paid work longer**, if they want to, whether their reasons are social, personal or financial. Work is good for wellbeing, especially if it is interesting, uses the individual's knowledge and skills, and is well managed;

- To **maintain personal independence** as long as possible and to compress the period of dependency. Learning can delay the effects of physical and mental decline, and reduce healthcare costs;

- To **engage older people as citizens**, and consult them about issues which affect them (as citizens as well as older people). Although many older people do not wish to see themselves as a separate group, they often have a distinct perspective on policy issues;

- To enable older people to **retain a sense of purpose and meaning** in life, as individuals and as contributing members of the community. Learning is an important way of finding and maintaining interests and activities;

- To **"age proof" services**, ensuring wherever possible that older people have equal access to opportunities, rather than parallel "special" services. Most old people would prefer to feel part of broader society, but, just as all people benefit from many facilities originally introduced for disabled people, so services need to be "age friendly" for all;

- To ensure that there are **effective partnerships** between public and third sectors in providing services for older people. Many services depend on voluntary effort, and voluntary work is one way in which older people can make a contribution to society.

7 What needs changing?

If these needs are to be met by lifelong learning in all its forms, a number of policy changes are required. These include:

- **Creating a framework** which describes what kinds of learning opportunity any older person can reasonably expect to find in his or her area. How these opportunities are provided will vary from place to place, but we need an agreement to make sure that an appropriate range of opportunities is available and accessible, to meet the needs and aspirations of individuals and society;

- **Giving Local Authorities a clear role** to coordinate and lead development at local level: bringing all the providers (public, private and voluntary) together, to coordinate resources, consult older people (current and potential learners), and promote learning among older people. This is consistent with the findings of the Audit Commission's 2008 report, *Don't stop me now*;

- **Giving greater attention to learning which strengthens communities** and helps people to maintain their independence and sense of purpose. In recent years adult learning opportunities have been skewed towards learning for work, and less attention has been paid to learning which helps people explore and develop interests and skills, and their understanding of themselves, and which create social networks which can provide meaning and support;

- **Develop education to prepare for retirement and the third age.** Retirement requires people, and their families, to make major adjustments, and to learn new skills and capacities. At present, pre-retirement education is short, and available only to a tiny proportion of people who work mainly for large, and mainly public sector employers;

- **Develop and fund effective approaches to learning in the "fourth age"** – including finding effective ways of joint working between education, health and social care. People entering a phase of long term dependency face great changes. Learning which maintains interests and activities can delay the onset of dependency and improve the quality of life. While there have been many small scale projects to explore the learning needs of this phase of life, and ways of meeting them, the findings of such experiments have not led to a coherent and accessible service.

8 Creating local leadership and partnership

The Opportunity Age Strategy outlines a national approach to ageing policy, but making it work has to be done at local level, where responsibility lies with Local Authorities. The Audit Commission review in *Don't stop me now*[7] was generally critical of their response. It found that only one third of Authorities had established a strategic approach to ageing policy, one third were working on formulating one, and the remaining third had made little or no progress. In general, it found that Authorities' ageing policies were concentrated on the delivery of social care services (for which Authorities have a direct delivery responsibility) rather than the broader issues of the wellbeing and active engagement of older people in the life of the community.

Following the 2006 Local Government White Paper, *Strong and Prosperous Communities*, Local Authorities are being expected to monitor health and wellbeing in their areas, and a new Place Survey was undertaken for the first time in 2008. This is designed to provide evidence of public attitudes on a number of issues, including social cohesion, civic engagement, involvement in volunteering, respect and anti-social behavior, health and wellbeing, satisfaction with home and neighbourhood, and ability to live independently. Lifelong learning can help with all of these, and areas which have well developed policies for lifelong learning might expect to see improvements in many of them.

However, few Local Authorities see learning as a key element of ageing policy. Since they stopped being responsible for Further Education Colleges, and then for the funding of adult education, they have become less involved in post school education. The decision of central Government to concentrate resources on vocational courses and basic skills has made it increasingly difficult to find funding for the kinds of learning which appeal to older people. As a result, some Authorities no longer have the staff and skills to tackle the learning needs of older people strategically.

Some of the needs have been met by Further Education Colleges, but they too have been cutting back on provision, and many of the gaps have been filled by a wide range of informal learning providers. Some of these are steered or managed by Government, but the bulk are organised outside any kind of Government policy framework or even

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7 Audit Commission (2008) *Don't stop me now : preparing for an ageing population*, London

knowledge. In trying to ensure that an appropriate range of opportunities is available in every area, Local Government therefore needs to build partnerships with a wide range of agencies and organisations. In doing this it will need to recognise that too much central management makes unrealistic demands on public funding, and reduces flexibility and innovation, but too much dependence on self organised provision raises questions about quality assurance and safety, about accessibility and long term sustainability. Some questions which need to be debated at local level include:

- What kind of infrastructure – premises, promotion, equipment – is required to ensure coverage of the core curriculum topics and priorities, coordination between public, private and voluntary sectors, and support to self organised provision?

- What kind of accountability and leadership is appropriate, and what agency/ies should take the lead? How should agencies relate to each other?

- Who should pay, how much, and for what?

9 What are the challenges?

Developing a more coherent policy for older people's learning raises several challenges (listed in no particular order):

Fragmentation of public policy.
Several Government departments have interests in older people's learning, but these are rarely well coordinated. Thus health education, financial education, education for citizenship and social engagement rarely link to broader kinds of learning opportunity, leading to duplication of effort, inconsistent approaches to charges and access, uneven quality, and lack of easy access for individuals. When these are all seen as separate services, individuals are less likely to continue learning, and to see themselves as autonomous successful learners.

National policy for education after school is the responsibility of the Department of Innovation, Universities and Skills (DIUS), but Government has encouraged DIUS to focus mainly on economic policy. The result has been a diversion of resources away from older people.

A major element of learning for older people relates to health, and policy responsibility for health and wellbeing rests with the Department of Health (DoH). Yet many of the factors which contribute to wellbeing – like participation in general learning – are not within the remit of the DoH. This runs the risk that lifelong learning for older people (and especially the very old) will be dominated by health issues, rather than broader concerns.

Lack of focus and leadership at local level.
Although lifelong learning can support a wide range of ageing policies at local level, most Authorities have yet to establish proper ageing strategies, and many have little awareness of the potential of adult learning to contribute, or the capacity or expertise to manage such learning.

Lack of organising capacity.
Ensuring a coherent and accessible range of lifelong learning opportunities calls for local capacity to organise and promote learning for adults. This role, which used to be played by some Local Authorities, has been eroded, or focused more sharply on specific disadvantaged groups (usually younger).

Inappropriate models for delivering learning.	The traditional "adult education" market model of provision, where individuals are expected to pay individually for most learning, is not good at meeting some of the key priorities for older people's learning. While some (particularly the more prosperous) are willing and able to pay for education as a leisure service, this is less the case for health education or education for citizenship.
Resource problems.	Public resources are seriously limited. This makes it especially important to make maximum use of voluntary and third sector resources, and self organised provision, but it can be difficult to ensure that such programmes are sustainable in the longer term, and there can be concerns about quality and accessibility.
Recession.	Sometimes public resources, especially access to buildings, workshops and equipment which could be used for learning, exist but are not available, because of conflicting policy priorities, unhelpful regulations or simply lack of awareness of the possibilities. As a result of changes in management, and concerns about security and child protection, many school buildings which used to be used for adult education are no longer available.
"Old" is not a positive identity.	Global economic developments in the recent past may focus attention sharply on unemployment, and policy for older people is likely to attract less political attention in the short and medium term. Older people will be increasingly vulnerable in the labour market, and their learning needs may take an even lower priority alongside learning for employability among young people.
Unanswered questions.	The strong focus of policy on engaging older people themselves in the design of services runs against the strong resistance of many older people to being defined as "old", with its associations of incapacity, decline and dependence. Many, perhaps most, older people would prefer to learn with people of all ages, rather than in specific "older peoples'" programmes.

There are a series of issues where the way forward is not clear, and perhaps further research is needed. They include:

- How can the balance between provision to address specific disadvantages be balanced against a more general offer?

- How much emphasis should be given to formal qualifications? Older people are less well qualified, but rarely choose to join courses leading to qualifications, and when they do so, they often opt out of the assessments.

- How important is the low level of basic skills of older people? The NIACE paper confirms that older people are much less likely to have formal qualifications, and many have real problems with reading, writing and numbers. However, the 2003 Skills for Life Survey, found that few people in their 50s and 60s saw this as a problem (perhaps people who have lived 60 years without good reading skills feel that they can manage without, and they may be right).

- How important is separate provision for older people? Some prefer this, and others prefer to learn in mixed age settings. The NIACE paper on curriculum and pedagogy confirms that age by itself has little impact on how people learn, although generations may differ in their preferences for how or where to learn. However, it does suggest that older people choose to learn different things, and that some kinds of motivation to learn change with life phase (late working life, active retirement, dependent old age).

10 An action plan

This paper has argued that lifelong learning can bring real benefits both to older people and to society. It can improve wellbeing; help mobilise voluntary effort and deploy underused skills and knowledge; reduce health and social care expenditure; and contribute to a more cohesive community. The following proposals form an action plan to reinvigorate lifelong learning for older people.

A lead role for local authorities

- Local Authorities have a responsibility for the welfare and wellbeing of their communities. However, their role in adult education has been eroded in recent years. They need to be given an explicit responsibility for the development of appropriate lifelong learning for older people as part of broader strategies for community cohesion and wellbeing, to complement their role in "leisure services", and in adult education contracted from the Learning and Skills Council. This role has now been endorsed by the *Learning Revolution* White Paper. They will need to do this in partnership with third sector agencies as well as formal education providers. In so far as the role is a strategic and coordinating one, this may not call for major new resources, although where the Local Authority itself is the provider, this may be the case.

Prioritise integration

- In carrying out their responsibilities for learning and older people, Local Authorities and education providers should seek, wherever possible, to encourage age mixing, to build relationships and trust across generations.

A national "curriculum framework"

- Work is needed to develop an agreed view of what range of learning opportunities should exist in any given area, as a basis for planning, and mentoring.

Preparing for retirement

- Pre-retirement education (which is about coping positively with life change, not simply instruction about the formalities of pensions and health), needs to be developed, and much more widely available. We spend 18 years preparing young people to enter the world of work, and most people are lucky if they get an afternoon preparing to leave it. The *Learning Revolution* White Paper endorses this.

Fourth age

- Work is needed to develop good models for learning in the fourth age, and identify good ways of enabling public, private and voluntary agencies in education, health and social care to work well together. The *Learning Revolution* White Paper endorses this.

Contribution and careers

- Learning opportunities ought to be available to help people to learn to deploy their skills, knowledge and interests for the benefit of wider society. "Careers" are commonly thought of as being a matter of paid employment. However, decisions about how to use your time in retirement can be equally complex, and if people are helped to choose and plan wisely, they can make a major contribution to the life of the community through formal and informal voluntary work. The Government's new Adult Advancement and Careers Service has a key role to play here, but will need to develop specialist expertise, and appropriate partnerships with third sector agencies.

Meeting places

- Adult education is unique among public services in being focused on groups of people working together (most public services treat people as isolated individuals). This is very important for social cohesion, for promoting good relations between generations and for supporting older people who are prone to social isolation (especially after bereavement or moving home), which can lead to depression and declining wellbeing. The Learning Revolution White Paper's "Open Space" proposals are designed to help with this.

Learning for work

- Older people should have access to learning for employment, both for those still in, or seeking, paid work, and for those seeking voluntary roles. This does not necessarily mean courses leading to formal qualifications. Often what people need is short, intensive help to update skills and knowledge, and to adapt their previous experience to new contexts.

Monitoring

- We need to monitor older people's participation in learning, and their views about what is available, regularly against the curriculum framework, at local and national levels, to make sure that what is being offered is relevant and of appropriate quality. The Learning Revolution White Paper proposes the creation of a new national indicator for Local Authorities to monitor how effective they are being in carrying out their responsibilities for informal adult learning.

11 Conclusion

The last decade began with great hope, and great expansion in learning by older people. For five years, numbers rose. Since then some public provision has been cut back, and some older people have found other ways and places to learn. Some of these will be better, some worse, but the growth and contraction, and the changes, are all the result of accidents, not a plan.

It is time that older people's learning was treated more seriously, not as something on the margins of attention, to be paid for if there is money left over. It should be recognised as something which can make a major difference to the quality of life of large numbers of people. It can make them happier and healthier, and equip them to play a stronger and more constructive part in the lives of their communities.

The aspirations expressed in *The Learning Revolution*, and the developments described in this paper, give some ground for hope for a better future.

Annex 1: PSA Targets 2007

Every three years, Government reviews all its policy objectives in the "Comprehensive Spending Review", and then develops, in consultation with local government and other agencies, a set of Public Sector Agreements, which lay out broad policy priorities for the next three years. Each PSA has a number of associated targets and all relevant Government agencies are expected to contribute to achieving them (though one department has lead responsibility for each PSA). Resources are allocated on the basis of the PSAs and performance is monitored, and the results published, for each target. There are currently 30 PSAs across Government, of which the following five have a particular relevance to older people and their learning.

PSA No.	Objective	Indicators relevant to Older Learners
2	Improve the skills of the population, on the way to ensuring a world-class skills base by 2020	Proportion of people of working age achieving functional literacy and numeracy skills Proportion of working age adults qualified to at least full Level 2 Proportion of working age adults qualified to at least full Level 3 Proportion of apprentices who complete the full apprentice framework Proportion of working age adults qualified to Level 4 and above Higher Education participation rate
8	Maximise employment opportunity for all	An increase in the overall employment rate taking account of the economic cycle A narrowing of the gap between the employment rates of the following disadvantaged groups and the overall rate: disabled people, lone parents, ethnic minorities, people aged 50 and over, those with no qualifications, those living in the most deprived local authority wards A reduction in the number of people on working age out-of-work benefits A reduction in the amount of time people spend on out-of-work benefits
15	Address the disadvantage that individuals experience because of their gender, race, disability, age, sexual orientation, religion or belief	Gender gap in hourly pay Level of choice, control and flexibility to enable independent Living Participation in public life by women, ethnic minorities, disabled people and young people Discrimination in employment Fairness of treatment by services

17	Tackle poverty and promote greater independence and wellbeing in later life	The employment rate of those aged 50-69 and difference between this and the overall employment rate
		The percentage of pensioners in low income households
		Healthy life expectancy at age 65
		The proportion of people over 65 who are satisfied with their home and their neighbourhood.
		The extent to which people over 65 receive the support they need to live independently at home
18	Promote better health and wellbeing for all	Proportion of people supported to live independently
21	Build more cohesive, empowered and active communities	The percentage of people who believe people from different backgrounds get on well together in their local area
		The percentage of people who have meaningful interactions with people from different backgrounds
		The percentage of people who feel that they belong to their neighbourhood
		The percentage of people who feel they can influence decisions in their locality
		A thriving third sector
		The percentage of people who participate in culture or sport

Annex 2: Two models of the purposes of lifelong learning

This paper has proposed the development of a national "curriculum framework" for older people's learning. Two models for such a framework have been developed, by UNESCO and by the National Inquiry into the Future for Lifelong Learning. These are summarised here.

In 1996 UNESCO published *The Treasure Within*, the result of a Commission of Inquiry chaired by Jacques Delors (commonly known as the "Delors Report"). This described the purposes of lifelong learning in terms of four "pillars".

Learning to know,	combining a sufficiently broad general knowledge with the opportunity to work in depth on a small number of subjects. This also means learning to learn, so as to benefit from the opportunities which education provides throughout life.
Learning to do,	in order to acquire not only an occupational skill but also, more broadly, the competence to deal with many situations and work in teams. It also means learning to do in the context of peoples' various social and work experiences, which may be informal, as a result of the local or national context, or formal, involving courses, alternating study and work.
Learning to live together,	by developing an understanding of other people and an appreciation of interdependence – carrying out joint projects and learning to manage conflicts – in a spirit of respect for the values of pluralism, mutual understanding and peace.
Learning to be,	so as better to develop one's personality and be able to act with ever greater autonomy, judgment and personal responsibility. In that connection, education must not disregard any aspect of a person's potential: memory, reasoning, aesthetic sense, physical capacities and communication skills.

A version of this model is being explored in the preparation of the Government's Informal Learning White Paper.

An alternative model has been produced by the independent National Inquiry into the Future of Lifelong Learning (IfLL[8]) which is examining a wide range of themes and issues likely to affect the scale and nature of need for adult learning over the next 30 years, and makes proposals for how those needs might best be met. One of its six major themes is the impact of demographic change, and the thematic paper *Demography and Lifelong Learning* was published in January 2009. The paper proposes that adult learning is needed to develop three complementary "capitals" (like financial "capital" – things an individual can acquire and build up, for use later).

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8 The Inquiry, undertaken by a team of Commissioners chaired by Sir David Watson, is independent, though sponsored by NIACE.

Type of capital	Definition	Current provision
Learning to be oneself (identity capital)	learning to be resilient, adaptable, confident, with a strong sense of one's identity and control over one's life.	This is the tacit purpose of a wide range of adult learning, including much "non-vocational" learning in the arts, culture and social sciences. Provision has been cut back in pursuit of more directly employment related programmes.
Learning to make a contribution (human capital)	the ability of the individual to contribute to the paid and unpaid economy, which can be pursued through explicitly "vocational" courses, and by informal workplace learning.	This is the explicit purpose of most DIUS funded learning.
Learning to be a part of a community (social capital)	the ability to live as an active member of a community with others.	This can be pursued by engaging in learning with others, whatever the ostensible topic of study. Provision has been cut back in pursuit of more directly employment related programmes.

The IfLL paper proposes that policy should aim to rebalance priorities, strengthening provision aimed at building identity and social capital.

Neither the Delors nor the IfLL model would form a basis for promoting learning to potential learners, but they would both assist in the shaping of public policy, and the monitoring of range and quality of opportunities available to older people (and people generally).

Annex 3: Some relevant recent reports

The last few months have also seen the publication of a number of research and policy documents with a bearing on these issues. These include (relevant extracts from each are attached to this paper):

The **National Inquiry into Lifelong Learning's** paper ***Demography and Lifelong Learning*** proposes a "curriculum" for later life which would ensure that adequate provision is made for six kinds of learning (in addition to a more general offer of demand driven provision):

- health
- finance
- citizenship
- information and communication technologies
- caring
- employability (for paid and unpaid work)

(www.lifelonglearninginquiry.org.uk).

Independently, Help the Aged have produced ***Learning for Living: helping to prevent social exclusion among older people***. This report proposed a range of structural changes, and a new "curriculum", similar to that proposed by IfLL, but based on four "literacies" for later life:

- financial
- citizenship
- health
- ICT

(www.policy.helptheaged.org.uk/_policy)

Don't stop me now: Preparing for an ageing population. This report from the Audit Commission reviews the response of Local Authorities to the Government's Opportunity Age strategy and to an ageing population more generally. It suggests that, to date, only 30% of Authorities have established a strategy for responding to the challenge, and 30% have not begun. It compares their response to *Opportunity Age* unfavourably with their response to the parallel *Every Child Matters* strategy, which has made a major impact of Local Authority strategies, structures and performance. (www.audit-commission.gov.uk)

Mental Capital and Wellbeing. The Government's Foresight Programme undertook a large scale study of current international research into mental capacity and wellbeing, across a very wide range of academic fields. The reports were published in December 2008. Several hundred expert reviews were commissioned of the state of the art in fields, including: neuroscience and psychology; education and training; mental and physical health; work and wellbeing, learning difficulties and disabilities; technology and pharmacology.

The final report highlighted the importance to mental capital and wellbeing of "five ways of wellbeing", all of which can be embodied in learning programmes:

- social engagement
- physical activity
- observation and reflection on the world
- continuing learning
- giving to others

(www.foresight.gov.uk)

Working for a Healthier Tomorrow. This report was commissioned from Dame Carol Black jointly by DWP and DoH. It demonstrated, from an extensive review of academic research, that work (defined mainly as paid employment), and especially well designed and managed work, has positive health benefits for individual and their families, and that early intervention to support people to return to work makes a major contribution to their physical and mental health. (www.workingforhealth.gov.uk)

Segmentation of Adults by Attitudes Towards Learning and Barriers to Learning. This report was commissioned by DIUS to examine motivation to learn, using the 2005 National Adult Learning Survey (people aged 16-69). It does not provide an age analysis, but it identifies ten "segments" of the population, analysed in terms of positive/negative attitudes to learning, and high/low barriers to participation. Two of the ten segments are specifically identified in terms of age. Segment 6 – "too late to learn" (11% of the population) is predominantly low qualified women over 45 without children who see education as not for them; segment 7 – "older into other things" (11% of the population) are over 45 and happy with their lives, and not interested in learning as such. Significantly, in both cases the reasons for not learning are attitudinal, and not the result of barriers to access. (www.dcsf.gov.uk/research/)

Older people, pedagogy and curriculum. This study of the literature was commissioned by DIUS from NIACE. It examines how different older people are, in terms of motivation, needs and aspirations for learning, and in preferred approaches to learning. It suggests that preferences and needs for learning do not vary greatly by age, and that there are few ways in which older people are distinct. It suggests rather that the concept of life phase provides a more appropriate framework. It points out that there is relatively little empirical research on these questions, and that the dominance of policy by medical and social care concerns has led to a concentration on deficit models of learning, and on physical and mental decline, which are unhelpful when considering the needs of people who are mostly in reasonable health and whose learning needs are as diverse as those of any other age group.

Older People Learning: myths and realities. This report, by Withnall, McGivney, and Soulsby, summarises what is known about the distinctive features of learning for older people. Most importantly it addresses the most common misconceptions about older people and learning, exploring the real research evidence and challenging stereotypes.

Literacy, Language and Numeracy and Older Adults. A report commissioned by DIUS from NIACE to examine the extent to which the basic education needs of older people are distinct. Conclusions are limited because the only national study which has assessed skills directly excluded people over 65. However, it is established from other sources that older people are less likely than younger ones to have qualifications in literacy and numeracy. However, it is not clear that older people perceive this as a problem, and there is some evidence that older people rate their own skills more highly than younger people, and than their test results suggest.

Strengthening the older workforce: an evaluation of the ReGrow project in the South East. This was an evaluation by CROW/NIACE of the first large scale project to trial careers guidance for older people in employment. It found that both individuals and employers responded very positively to the provision of careers advice and short, focused training. The effect was generally to strengthen attachment to work and to the employer, and employers reported improved motivation and productivity. (www.niace.org.uk)

Age, Training and Employment: a review of the literature. This paper (unpublished) was produced by CROW/NIACE for DfES in 2007. It found that participation in work related learning by older people was strongly correlated with previous educational qualifications, and that there was some evidence to suggest that employers and employees collude to avoid training. Most critically, it found almost no empirical research into the relationship between training and employment for older people.

Two further major contributions have been made recently to understanding of ageing, but with less direct implication for adult learning. They are:

Living in the 21st century: older people in England. This is the report of the 3rd wave of the English Longitudinal Study of Ageing, which has now surveyed people born before 1952 three times, and people born before 1956 once. ELSA focuses strongly on health issues and has not directly reported on participation in adult learning, although a question on activities includes an option on participation in evening classes (not analysed in the published report). However, it did find a strong relationship between prior education (terminal education age/qualifications) and extending working life. It also found that those who left school at the minimum age were more than twice as likely to be "socially detached" than those with higher education experience. (www.ifs.org.uk/elsa/report08/elsa_w3.pdf)

Indications of Public Health in English Regions (vol. 9: Older People). This report, published by the Association of Public Health Observatories, draws together the findings of a very wide range of surveys and studies of older people's health, including mental health and wellbeing. (www.apho.org.uk)

Glossary

APHO	Association of Public Health Observatories. Collates and publishes information on public health on behalf of DoH
Black Report	Review of the health of British working age population, led by Dame Carol Black
CROW	Centre for Research into the Old Workforce, founded at the University of Surrey, now part of NIACE
DfES	Department for Education and Skills. Predecessor of DIUS
DIUS	Department for Innovation, Universities and Skills. Responsible for all post school learning in England
DoH	Department of Health
Elbourne Report	Review of older people's engagement in policy. Led to the Government paper *Empowering Engagement: a stronger voice for older people* (2008)
FE	Further Education. Delivered through FE Colleges, Workbased learning and Adult Education services
Fourth age	The phase of life where people are increasingly dependent on others for some of the activities of everyday life. For most people it begins somewhere in the 80s, but for others it may come earlier or later.
HEFCE	Higher Education Funding Council. Responsible for public funding of all Higher Education in England.
IfLL	Inquiry into the Future of Lifelong Learning – an independent Inquiry, sponsored by NIACE. Will report in Autumn 2009
LSC	Learning and Skills Council. Responsible for public funding of Further and Adult Education in England.
NIACE	National Institute of Adult Continuing Education
PSA	Public Sector Agreement
ReGrow	An LSC/ESF project to test demand for career guidance among older workers
Third Age	Usually defined as the phase of active life after (or towards the end of) paid employment. This phase has expanded greatly in recent years. For many people it now lasts for over 25 years.
Third sector	Voluntary and not for profit organisations