AUSTRALIAN JOURNAL OF ADULT LEARNING

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AUSTRALIAN JOURNAL OF ADULT LEARNING

Special Issue:
'Getting of Wisdom', Learning in Later Life

From the Guest Editors' desk

Sabina Jelenc Krašovec, Barry Golding, Brian Findsen
& Bernhard Schmidt-Hertha

This specially themed *'Getting of Wisdom', Learning in Later Life* Edition of AJAL is not so much concerned with the issue of ageing itself, but more about quality of life regardless of age. It is about taking, but also giving back as best as possible at any age. As guest editors, we regard this as being about rethinking the possible richness of humanity and connectedness of lives regardless of time and space. We are hopeful that this issue provides an optimistic and timely message that each of us can contribute towards social emancipation and greater equality.

This special issue is a result of the one week 'The Getting of Wisdom Exchange', a collaboration between around 100 adult education practitioners and researchers from ten countries from Australia, New Zealand, Asia and Europe. Experiences and knowledge were shared during three one-day conferences, which were held in Ballarat, Australia (13 February, focused on *Older learning in diverse contexts*), in Melbourne, Australia (14 February, focused on *Learning in later life and social inequalities*), and in Wellington, New Zealand (15 February, focused on *Learning, empowerment and identity in later life*). The program of all three conferences consisted of international as well as local papers and presentations. The focus was on learning in community

for being, becoming and belonging. Community was perceived as
a forum for building relations, which encouraged the forming of
space, open for learning. The focus of discussions was on the roles of
communities, established by people, by their connections and creativity,
by reciprocity, exchange and sharing knowledge and skills. Possibilities
for being, becoming and belonging into community are lifelong and
lifewide, presupposing acknowledgment of heritage, culture, languages,
traditions and art; they presume connection between past, present
and the future. We opened up questions of linguistic and cultural
imperialism, intersected with questions of what counts as indigenous
learning, but there was also a strong need to learn how to incorporate
non-Western epistemologies in our too often monocultural scientific
knowledge (Darder, 2012). Western modernity is founded on the tension
between social regulation and social emancipation and distinction
between metropolitan societies and colonial territories. As Santos (2014)
said, emancipatory dichotomy only applies to metropolitan societies,
but never to colonial territories. This point was an important issue at
our conferences and during our visits to communities. Each country,
particularly countries where Indigenous people live, and in the case
of Australia have lived for thousands of generations, has to address
diversity as a core of global resistance against capitalism and search
for the alternative forms of sociability (Santos, 2005; Coleman, 2012).
We've been therefore talking about the invisible and largely subjugated
knowledge, which includes popular, peasant, indigenous knowledges,
knowledge of and for older people, which are, as Santos (2014) says, on
the other side of the line, and could not be fitted into 'true knowledge'.
We've talked about the need to overcome distinctions between 'nature
and culture, natural and artificial, mind and matter, observer and
observed, subjective and objective, collective and individual' (Oliveira,
2017: 14), but also about being in the network of spaces-times, defining
the frame for our learning.

Wisdom was a word, standing out and reflecting the wish of participants
of the exchange to understand learning in different contexts, from
various perspectives, reasons and with diverse goals. But does wisdom
reflect the struggle to overcome inequalities, defined by class, race,
age and gender? If we look through these lenses, age seems not that
important any more as a defining characteristic, but more as an
additional factor which should be taken into account when assessing

learning and educational activities and possibilities of different age groups in different contexts, particularly political. However, to connect past, present and the future, memories of older people, intertwined with the knowledge of heritage and tradition, are crucial. Age and wisdom are therefore related and bring new solutions and possibilities to the forefront. For long-life societies (Sigg & Taylor, 2005), valuing these resources is essential and one crucial part of developing new ideas of solidarity and community, given that people can expect increasingly longer and healthier lives in more digitalized and multicultural societies.

Our main focus was on the quality of life of members of the community, particularly older people, with the emphasis on social inclusion, participation and civic engagement. During conferences, meetings and field visits we saw copious evidence that older adults are a very diverse population with different learning and social needs and abilities, very different learning pre-conditions, interests and educational requirements. Most older people don't participate in formal and non-formal, organized education. As research shows, older participants in education in most 'developed' nations are primarily formally educated women, predominantly white, with better occupational backgrounds (Findsen & Formosa, 2011; Schmidt-Hertha, Jelenc Krašovec & Formosa, 2014, etc.). An important question is, "What are the aims of learning and education of older adults and how could possibilities for successful life also in older age be provided?" Older people should be allowed to talk about their own ageing and their perception of the need to learn and change. What are their images of ageing, as Featherstone and Wernick (1995) define it. What are their ideas about their own ageing?

The way older adults self identify and evaluate themselves, their possibilities and perspectives related to health, cognitive abilities and societal contribution influences their health and wellbeing in later life significantly (Levy, 2003). The same effect can be observed for how they are addressed by their social environments. If relatives, friends, neighbours and other people treat them just as frail, irrelevant and in need of help in their social environment as a result of negative age stereotypes, they are, in effect, exhibiting a patronizing attitude towards older peoples. This affects older people's self-efficacy negatively, and neglects or discounts the value of their knowledge and experience, including a high risk of being excluded from communities.

These findings confirm that there is a strong need to support community education and learning through sometimes radically different settings, like neighbourhood houses and Men's Sheds in Australia and Aotearoa/New Zealand (Golding, 2015). These kinds of settings are not primarily devoted to learning, but are spaces where informal learning and occasional training occurs. Community settings (associations/ organizations) are ideal places also for strengthening intergenerational solidarity, which is diminishing with demographic ageing, creating cultural gaps and conflicts among generations (Estes, Biggs & Phillipson, 2003). Papers, presented at the conferences in the frame of the Exchange addressed all the mentioned perspectives and questions.

Participants of 'The Getting of Wisdom Exchange' came from different countries with different political backgrounds; our discussions were marked by people, coming from different cultures, speaking different languages, and dreaming different dreams. Among participants and presenters there were Indigenous scholars and community members in both Australia and Aotearoa/New Zealand, discussing social and individual identity formation and sharing their knowledge on barriers to and possibilities for emancipation of Indigenous people. Participants were from different age groups, which encouraged intergenerational interaction and opened questions, important for the evaluation of age roles in groups and the community. All in all, the Exchange was a strong learning experience for all of us. We've learned that – regardless age – we should all make more effort to establish emancipating learning practices. They should be intertwined with everyday life of older people and based on networks of knowledge and networks of people in different living spaces (domestic, community, citizenship, the world), as defined by Boaventura de Sousa Santos. They should connect our individual and social identities 'on every level of social life, in a permanent and dynamic way, even though we remain grounded in our roots' (Oliveira, 2017: 4). And as Santos stresses, despite the roots upon which we depend, we have a possibility to choose.

In this issue, papers are presented from Sweden, Ireland, Aotearoa/ New Zealand, Australia, Slovenia, Poland, Germany, Portugal and the United Kingdom. Papers cover different topics and open questions about various issues in older people's learning. Papers are in the alphabetical order by the surname of the first author.

In the first article authors **Helene Ahl (Sweden), Joel Hedegaard (Sweden) & Barry Golding (Australia)** compare the organizational

conditions for Men's Sheds in Denmark and Australia, and highlight the experiences of the Danish participants. After presenting a description of some of the salient organizational and contextual factors of Men's Sheds in Australia, they analyse, describe, and compare two Sheds in Denmark, developed mainly as a result of the wish to improve men's health by customising the Australian model to a new Danish context.

In the second article, **Ann-Kristin Boström** (from Sweden) deals with lifelong learning (LLL) in practice, focusing particularly on popular education and study circles. She presents the development and the implementation of the LLL model, to emphasising that social economy is supported by informal learning, voluntarism and social relations. The author presents recently developed knitting cafés and poses the question, 'Who is getting education and learning in later life?'

Lucia Carragher from Ireland is the author of the third article, in which she analyses the "buffer generation" of men, caught between the silent, strong, austere masculinity of their forefathers and the demands of contemporary society. Using mixed method research she analysed the well-being of 297 older men, involved in community-based Men's Sheds in Ireland. Her findings demonstrate that we can no longer ignore nor deny the social, environmental and cultural factors which influence the lifestyle choices and risky behaviours of some men.

Brian Findsen from New Zealand investigates the engagement of universities in older adult education in the specific context of Aotearoa New Zealand. As expected, he finds out that older adult education exists only on the margins of the formal education system and discusses initiatives mainly beyond New Zealand to observe new trends in other societies that might be applied in practice. He offers a reflection of possibilities to identify potential for future development in New Zealand in its university sector.

The first of the autoethnographic articles in this issue, written by **Barry Golding** & **Annette Foley** from Australia, actively mirrors ways of using techniques developed through academic autoethnography to empower older people to share and make sense of their lives by exploring some of the unexamined assumptions that govern everyday life, behaviour and decision making. They discuss the role of wisdom in later life learning and present their autoethnographic stories as researchers.

The next article, written by **Sabina Jelenc Krašovec** & **Marta Gregorčič** from Slovenia analyses informal learning through participatory democracy processes from the perspective of intergenerationality. Their findings show that through the process of participation in self-organized groups, besides knowledge and skills of all involved generations, values and attitudes regarding other generations have changed most dramatically. They conclude that participation in political community activities has immense potential for reaching new forms of solidarity and trust between younger and older generations.

Małgorzata Malec Rawiński from Poland analyses what it means to be an older (age 65+ year) Polish immigrant in Sweden by applying a biographical approach. She emphasizes the broader contexts in which the individual's story and experiences are embedded. Her article presents a single case study of a 93 years old Polish immigrant lady based on an outstanding life story including her recollections and experiences during the liberation of Poland, which, together with experiences from migration, shaped her life and learning across the life-course.

Bernhard Schmidt-Hertha and M**argaretha Müller** from Germany look at older workers and their participation in continuing vocational training. Based on a representative survey of the German labour force, they investigate the meaning of educational and occupational biographies for current participation in continuing vocational training. Whilst these effects cannot be demonstrated in multivariate regression analysis, the study points to significant gender differences, which demand further investigation.

Robert Tobias from New Zealand writes about the history of adult and community education (ACE) in Aotearoa New Zealand from the 1970s to 2016, with special reference to the changing context for the learning and education of older adults. He sets these changes in the context of responses to a number of parallel economic, political, social and cultural changes, including growing inequalities under the influence of neoliberal policies, and the rise of several progressive social movements, particularly those associated with the Māori renaissance.

Esmeraldina Costa Veloso from Portugal explains the specific development of the U3A in Portugal. She compares the Portuguese

U3A with other models, searching for specific national characteristics, By analysing the shift in the organisation of U3A, she attempts to understand and explain changes in its organization. In Portugal different educational and training projects coexist, particularly within the domain of the so-called Senior Universities or Senior Education Programs, which meet the different expectations of a heterogeneous group of older adults.

Next to last paper is an autoethnographic journey, written by **Alexandra Withnall** from the United Kingdom. From a feminist perspective, she analyses the process of diagnosing and living daily with the illness of Type 2 Diabetes. She describes the process of self-learning to identify, access and to use necessary resources to manage conditions of illness through personal experience. She critically evaluates the available non-formal educational programs as well as help for patients and offers deep reflective analyses of the whole self-learning and self-healing process.

The last paper, Mā te ora ka mōhio / 'Through life there is learning' offers a critical rethinking by the editors, **Brian Findsen, Barry Golding, Sabina Jelenc Krašovec and Bernhard Schmidt-Hertha**, based on a critical reflection of the papers, as well as the process of the Getting of Wisdom Exchange and the final Declaration, jointly created and accepted by the European, Australian and Aotearoa/New Zealand participants.

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People who have reviewed for AJAL in 2017

Scholarly journals depend on the contributions and support of referees in ensuring their ongoing quality. Without the generosity, wisdom, and rigour of our reviewers, the *Australian Journal of Adult Learning* could not exist. I would like to take this opportunity to acknowledge and thank all those who have given of their time and expertise over the year.

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How the Men's Shed idea travels to Scandinavia

Helene Ahl, Joel Hedegaard & Barry Golding

Jönköping University, Sweden &
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Australia has around 1,000 Men's Sheds – informal community-based workshops offering men beyond paid work somewhere to go, something to do and someone to talk to. They have proven to be of great benefit for older men's learning, health and wellbeing, social integration, and for developing a positive male identity focusing on community responsibility and care. A Men's Shed is typically self-organized and 'bottom-up', which is also a key success factor, since it provides participants with a sense of ownership and empowerment. Men's Sheds are now spreading rapidly internationally, but the uptake of the idea varies with the local and national context, and so too may the consequences. Our paper describes how the Men's Shed travelled to Denmark, a country with considerably more 'social engineering' than in Australia, where Sheds were opened in 2015, via a 'top-down' initiative sponsored by the Danish Ministry of Health. Using data from the study of the web pages of the Danish 'Shed' organizations, from interviews with the central organizer, and from visits and interviews with participants and local organizers at two Danish Men's sheds, we describe how the idea of the Men's Shed on the Australian model was interpreted and translated at central and local levels. Preliminary data

indicate that similar positive benefits as exist in Australia may result, provided that local ownership is emphasized.

Keywords: *men's sheds, institutional theory, informal learning, masculinity, gender, older men's well-being.*

Introduction

Commencing in the late 1990s, by late 2016 around 1,000 community Men's Sheds had opened in community settings across Australia, with a further 350 now open across Ireland, 300 in the UK and 70 in New Zealand (Golding, 2016). A community Men's Shed is a physical place and organization which offers men, mostly older men beyond paid work - retired, unemployed, or with a disability – somewhere to go, something to do and someone to talk to, as conceived by the late Dick McGowan in Tongala, Victoria in the very first Men's Shed in 1998. The most common activity is wood- or metalworking, but can also involve whatever activities men decide upon, such as game playing, cooking, gardening, singing or working with computers. Men's Shed organizations typically also contribute to their local community by, for example, building playgrounds for children.

Men's Sheds in Australia, and to a lesser extent also in Ireland, have been well researched, and found to greatly benefit men's health, wellbeing, and social integration, through informal, practical, and social learning in a local community (Golding, Brown, Foley, Harvey, & Gleeson, 2007; Golding, Foley, & Brown, 2007; Carragher, 2013; Cavanagh, Southcombe, & Bartram, 2014; Golding, 2015). Sheds have shown to be health promoting: participating in social activities and practical tasks has positive health effects in itself, and participants further encourage each other to take care of their own health to a greater extent by, for example, better diet and exercise habits (Morgan, Hayes, Williamson, & Ford, 2007; Wilson, Cordier, & Wilson Whatley, 2013; Haesler, 2015).

Other studies have found that Sheds work well for integration of men from different ethnic enclaves, or for reaching excluded groups (Misan & Sergeant, 2009; Carroll, Kirwan, & Lambe, 2014). Boys at risk have found refuge among older men who have acted as mentors (Cordier &

Wilson, 2014). Sheds have also been shown to develop a positive male identity focusing on responsibility and care for others and self, making men relinquish the idea that masculinity necessarily equals strength and invincibility (Golding, 2011; Haesler, 2015).

There is, hence, solid evidence of positive individual as well as group level effects. Cited studies indicate success factors on the organizational level. The first factor is the relative absence of women, which for the older men participating in Sheds creates a relaxed, open, and forgiving atmosphere. The second factor is the focus on informal, practical and social learning as opposed to formal learning with teachers and a curriculum. The third factor is that Sheds are typically organized 'bottom-up' that provides participants with a sense of ownership and empowerment.

Golding's analysis of Men's Sheds globally to 2014 (Golding, 2014b, cited in Golding 2015:403) concluded at a mega level that Men's Sheds:

> *... are in part about older men working to build a more human and democratic society without exploitation and exclusions; ... affirming older men as learners and active beings in the process of becoming; ... creating spaces of dialogue and participation and the construction of popular power through democratic organizations and coalition.*

Men's Sheds are at a practical and community level organizations that have the ability to informally recreate salient aspects of men's former workplaces, which for many ease the sometimes difficult transition from paid work to retirement (Gradman, 1994). Studies focusing directly on organizational aspects of Men's Sheds are few, however. An exception is an Australian study of the Men's Shed coordinator's role, which showed that the provision of functions such as scheduling, recruitment of volunteers, peer training and development, or the maintenance of health and safety standards was instrumental to the many positive benefits that the participants reported (Cavanagh, McNeil, & Bartram, 2013).

The present paper focuses on how Men's Sheds have travelled to Denmark. More specifically, we compare the organizational conditions for Sheds in Denmark and Australia, and highlight the experiences of the Danish participants. Denmark has a different institutional set-up from Australia, which will most likely create different conditions for the organization of Men's Sheds than experienced in Australia. Gender roles

may also be differently configured in the two countries, which might have consequences for the idea of a separate Shed for men. Denmark has a Scandinavian (bigger) welfare state, with considerably more 'social engineering' than in Australia. Even if all Scandinavian countries have been affected by neoliberal influences, Denmark's welfare state model is still social democratic in Esping-Andersen's (1990) terminology, in which the state (as opposed to the market in the Anglo-Saxon, liberal model, or the family in the conservative model) takes the main responsibility for welfare provision for its citizens (Esping-Andersen, 1990).

Men's Sheds in Denmark were initiated from above by the Ministry of Health, rather than from below, which is actually anathema to the success formula for Sheds as developed elsewhere. As Glover and Misan (2012:71) put it, 'men come together in men's sheds not to be corrected or fixed, but to be able to express themselves to other men while not having the fear to be judged.' The establishment process being mainly bottom up makes the experience both empowering and transformational for men.

Our paper asks several related questions related to international translation, including: 'How is the Men's Shed in Denmark organized?', 'Which of the original ideas have travelled and transferred well?', 'Which ones were changed?', 'What Danish circumstances have necessitated such a change?' and 'Are the effects and the success factors the same as in Australia?' By studying Men's Sheds from an institutional theory perspective and in a trans-national context, we aim to make a valuable empirical contribution to organizational research on the Men's Shed Movement, and, by implication, on the organization of older men's informal learning and wellbeing.

The paper is organized as follows: We begin by presenting our theoretical framework including a description of some of the salient organizational and contextual factors of Men's Sheds in Australia which will serve as the base line for comparison. We then detail the method and the material. The results section then describes the organization of the Men's Shed in Denmark, along with information on key institutional differences between the countries. The paper concludes with a comparative analysis as well as conclusions and implications regarding the resilience of the Men's Shed model in different institutional and national contexts.

Theoretical framework

We interpret our material using institutional theory (Veblen, 1926; Berger & Luckmann, 1966; Douglas, 1987; Selznick, 1996). An institution is an action pattern with a normative explanation, which provides an interpretative frame for thought and action, both inhibitive and enabling (North, 1990). Scott (1994, 2001) divides institutions in three components: The *cognitive* dimension consists of taken for granted views of "how things are'. In Sheds, this might be ideas of meaningful activities for men or women, or old or young. The *normative* dimension consists of social norms and values. Examples in the Shed might be norms on how to relate to each other, or about how to organize a Shed. The *regulative* dimension consists of laws, rules and policies, but also of control and evaluation systems, and how these are created and maintained. Danish regulations may, for example, force the Sheds to change the original design in order to comply. Institutional theory would say that Sheds in such case become *co-opted*.

Whereas institutional theory is generally interested in why things tend to stay the same (Selznick, 1996) Scandinavian institutionalism has instead focused on change (Czarniawska & Joerges, 1996). It holds that institutions travel and spread through a process of *translation*. The theory predicts that when an idea travels from one context to another, the idea will change depending on how the local actors (re)interpret it, but the idea will also change the local actors (Czarniawska & Joerges, 1996; Czarniawska & Sevon, 2005). Consequently, we study how the Men's Shed and the movement travelled to Denmark and how it has been translated in the Danish institutional context. To further clarify the interpretative framework: an institution is not an organization. The institution decides the 'rules of the game', the organization and its members are its 'players' (North, 1994). But the organization may, while playing the game, change the institution.

Consistent with institutional theory, gender (or masculinity/femininity) is seen as an accomplishment (Butler, 1993; West & Zimmerman, 1987), or even an institution, with cognitive, normative as well as regulative dimensions (what a man "is', what a man "ought to do' and possible accompanying regulations).

Key organizational features of Men's Sheds in Australia

The most important features in Australian Men's Sheds are, according to Golding (2015:13), the following:

- *First*, by using gender stereotypical activities, they attract men, particularly older men and men beyond paid work, to help them become empowered and look after themselves, each other and their community.

- *Second*, the service provider is put at arm's length. The men are active and equal *participants*, they are not patronized as clients, customers, patients or students, by service providers, teachers, (or women).

- *Third*, they are organized informally, and bottom-up, which, according to Golding, can be 'anathema to increasingly top-down, outcome driven service organizations and governments'.

In essence, the formula is: no (or very few) women, no (or very few) authorities, and a relative absence of predetermined target goals, prescriptions, or measurement. In terms of adult learning, the pedagogies are distinctively and deliberately informal, without teachers, curriculum or assessment but involving informal mentoring in men's communities of workshop-based practice, leading Golding (2014a) to playfully but purposefully propose and define the term *shedagogy*.

There are other movements that have become transnational in adult and community education and turned out to become gendered. Mechanics Institutes and Workers Education Associations (WEAs) both started in Scotland in the 1820s and later became very popular in Australia, mainly for men. More recently, the 1970s neighbourhood houses and community centres have proliferated within Australia, in practice catering mainly for the interests and needs of women. The U3A Movement began in France with an academic emphasis in 1973 and has since been translated into quite different, community based self-help organizations in many countries, again mainly for women.

Men's Sheds are different from these earlier movements in that they unashamedly have a clear and overt gender dimension. Whilst in Australia, the decision about whether and how some women might be involved (or not) is made at the organization and community level, the

participants of most Australian Men's Sheds are only or mainly men. In Denmark, the authority that has created the *Mænds Mødesteder* model has decided it is a men's only place and space.

The development and proliferation of Men's Sheds and the associated movement as an informal community intervention, in Australia and in other mainly developed Anglophone nations to 2015, need to be understood in the context of the general failure of institutional and community-based adult education to reach some men. McGivney (1999, 2004), researching in the UK, was the first to seriously suggest some groups of men were effectively excluded and missing from adult and community education and to suggest an adult learning gender divide. Golding, Mark and Foley (2014) identified particular issues for mainly older men beyond paid work, and concluded that 'Certain forms of education can (and do) have the unintended effect of turning men and boys away from learning, thus adversely affecting men and their families' (p.256). Further, they concluded (p.256) that men of all ages who stand to benefit *most* from lifelong and life-wide learning are those least likely to access it, particularly if it is packaged and presented in a way which is overly formal and patronising based on deficit models of provision.

Some organization is, of course needed to get a group together around a common activity, and there are both state and national associations providing advice, support and group insurance for Men's Shed-based organizations in all countries where Men's Sheds and a national movement are firmly established, specifically in Australia, Ireland, the UK and New Zealand. The Western Australian (state) Men's Shed Association (WAMSA, 2016) has the following advice for anyone interested in starting a Men's Shed: First, gauge the local interest, for example, through a local newspaper article. Then advertise a local meeting, in cooperation with, for example, the Local Government Council and a Rotary Club, and form a steering committee and later an incorporated association with the people who attend. Look for funding from your local council or from any of a list of charitable or interest organizations. That's about as far as the advice goes. The rest, finding a Shed, fixing it up, raising the funds and organizing the activities is completely up to the local members to find out and do. As will be discussed below, the Danish Men's Sheds followed a quite different route.

Method and material

We use a case study approach, piecing together a rich description by using information from several different data sources (Stake, 1995). Our data comes in part from the study of the web pages of the Danish 'Men's Shed' organizations (*Mænds Mødesteder*, that roughly translates into English as 'men's meeting places'). We also draw on interviews with the central organizer, and from visits and interviews with participants and local organizers at two Danish 'Men's Sheds', here labelled Shed 1 and Shed 2[1]. The authors spent a day at Shed 1 and at the newly opened Shed 2 in October 2016, accompanied by the Danish national coordinator. One of us also visited Shed 1 along with the national coordinator just after it opened in September 2015, and have maintained communication with the coordinator since then.

At the Sheds, we had informal conversations/interviews with the participants, with the local chairmen, and with the municipal contact persons. We were further given the opportunity to observe the activities taking place during our visits. Conversations were not recorded, but notes were taken and observations were discussed among the researchers.

Websites analysed were: Men's Health Society, which initiated Sheds in Denmark (MHS, 2016); The central web page for the Danish Men's Sheds, which has basic information as well after all links to reports and other relevant websites (Sundman, 2016); Newspaper articles describing the movement's reception in Denmark; and, the sites of the two Danish Sheds that have built their own websites (linked from Sundman, 2016). The websites were visited in November 2016. General information on Danish institutions comes from official statistics and relevant literature, cited in the text.

Results: Men's meeting places in Denmark

While most Australian Sheds were started by grass-roots initiatives, the Danish Sheds were initiated top-down, with a specific, instrumental purpose in mind. Motivated by Danish men's consistently lower life expectancy and significantly higher rates of depression and suicide (MHS, 2016), the non-profit organization *Men's Health Society* was started in 2004, with the purpose of developing knowledge about and organizing activities around Danish men's health. The society initiated a *Forum for Men's Health* which is a partnership with over 40 partners –

professional interest groups, unions, businesses, patient organizations, research centres, counties, municipalities, and media organizations – all with an interest in improving men's health (Sundman, 2016).

Forum for Men's Health employs a small staff. They obtained a large grant from the Ministry of Health and other public sponsors to start Men's Sheds in Denmark. They developed a logotype consisting of two men in silhouette, standing 'shoulder to shoulder' (the motto for Men's Sheds internationally) and forming the letter M. They specifically targeted older, lower-educated men who, according to one of the initiators, psychologist Svend Aage Madsen, are likely to be single, have unhealthy life-style habits, and tend to avoid health care professionals (DR, 2016).

In December 2016, twelve Danish Sheds were in operation and five more were planned. Typically, the national coordinator would find a local contact person in a municipal care organization to help set it up. The local contact person would locate a suitable facility, often a municipal building no longer in use, or a privately owned building over which they would take a lease. The municipal contact person would help recruit participants as well.

At Shed 2, the contact person simply put an advertisement in the local paper. No one came, but after the second advertisement, the person to become the local chairperson and champion of the Shed showed up. 'What attracted you?' we asked. 'Well, the wife saw it, and thought that this might be something for me, so she sent me' he replied. This is a rather typical answer – some men need considerable encouragement to take the step and join a Shed. The members of Shed 2 planned to arrange an exhibition at the yearly 'cultural night' event in the municipality to attract more members. A local politician was also present during our visit. He said that the reason the municipality sponsored a Shed was to improve quality of life of its senior citizens while saving taxpayers' money. 'The cost of a Shed promises to be very low in comparison to what we can save on elder care,' he argued.

Once members and a facility were secured, the first task was to fix up the house. This is something that the men did themselves, using the skills and resources they had at hand. The fixing up turned out to be a major shed-based activity in itself, thereby creating many of the same positive benefits as in Australia – friendship, camaraderie, a sense of being useful and valuable, and a common community purpose and benefit.

Each Danish Shed is organized as a non-profit association, with a board, a chairperson, secretary and cashier. A pattern similar to the one in Australia emerged: one or a few very resourceful men saw great pleasure in organizing meaningful activities for other men. The person responsible for setting up a web page in Shed 2 said that he and his wife were members of many different societies, but the other ones did not offer him the opportunity to take responsibility for a meaningful task – they were perceived as 'mere socializing'.

The chairman at Shed 1 is a former project manager of a large industrial company who spends more than 40 hours a week volunteering for the Shed. He has raised considerable sums for the Shed in sponsorship money from local businesses or organizations, which has paid for the restoration of the building and for a very well equipped workshop. But other members were more on the receiving end. A member of Shed 2, old and rather frail looking, said that he was very happy to come to the Shed and just sit and chat.

In Shed 1, activities going on during our visit were aspects of woodworking – the men made outdoor furniture for day care centres. They also undertook computer training and played cards. A group of men were busy in the kitchen cooking lunch for everyone. Other activities on the schedule were painting, taking walks, fishing, excursions, or playing darts. They were also in the midst of constructing a petanque court for those not able to take long walks.

The around 40 participants, all men, were, as far as we could judge, retired from paid work. The chairman told us that being only men, and doing something together in a supportive and non-threatening environment, was instrumental to opening up themselves. 'The first day they stand shoulder to shoulder, working, with their attention to the task at hand. The next day they continue, but start talking to each other, and the third day they see each other in the eyes and begin to talk like a woman', which in his interpretation meant talking about health and personal matters. Likewise, getting older men to visit a health care centre was difficult, he said, but when a nurse visited the Shed, they all lined up to get their blood pressure taken.

Some of the participants echoed this sentiment: they said that the Shed, after a while, allowed and provoked conversations about health and personal matters, perceived to be unusual among men. They could

have conversations without the initial detour of 'talking about cars'. One of them pointed out that the Shed freed his wife of some of the responsibility she used to assume for her husband's wellbeing. The men in the kitchen cooking lunch said that they did not want women there. 'They would just take over and decide how to organize the pots and pans', they claimed. The women would thus, in effect, disempower the men.

The rules for the Danish Men's Sheds are available at the central web page. They state that *Mænds Mødesteder* are non-commercial meeting places for men over 18 years, where they can engage in meaningful activities, together, at their own pace and in a safe and friendly environment. Everyone is welcome and considered an equal. Men are invited to exchange knowledge and experience and to realize their potential together with others. Sheds are defined as being democratic, non-political and non-religious. Alcohol or drugs are not allowed, and smoking must take place outside. During our visit, we observed a brochure for Shed 1 that basically reiterates these rules, but in a friendlier and more inviting manner.

The non-drinking policy was particularly effective. Denmark has a strong drinking culture (World Health Organization, 2012), particularly among men. Socializing normally takes place around alcohol. Our interviewees reported that by socializing without alcohol, they learnt that this worked well, and the habit spread to other social contexts.

While our study is too limited to be evaluative, our conversations with the participants appeared to indicate similar positive results as reported in research from Australia or Ireland. They showed us, with great pride, the many different things they had built and designed. They obviously liked being there, together, and they were clearly proud of their Shed that they had so visibly transformed into a pleasant and well-functioning facility.

Comparative analysis and discussion

Judging from this small case study, the Danish Sheds seem to deliver some of the same benefits as in Australia. But do the same organizational principles apply? The first principle, a men-only environment, applies in a very similar manner. This indicates that the institution gender, which we assumed would be different in Denmark due to its position as one of the most gender equal countries in the world in terms of factors such as women's participation in the labour market,

in higher education, and in national and local government, as well as the generous parental leave system and fathers' up-take of this (UNdata, 2012), is not that different, after all. Part of the explanation might be that the demographic that the Sheds cater to, older, former workers, (and most likely also their partners) were raised during a time when women had traditional, and secondary positions and roles. Most likely, they have also spent most of their working lives in gender-segregated jobs in mainly men-only work environments. Using the terminology of institutional theory, even if the regulative environment for gender relations had changed considerably since the mid-1900s, this does not affect retired men very much, and their cognitive and normative conceptions of gender tend to be conservative.

One could speculate that this might change in the future. Men's Sheds *might* be a time-specific solution, perfectly adequate for older men in Denmark at this time, but maybe not when today's young and middle-aged men grow old. While it remains to be seen, the gender order is typically resilient to change (Ahl, 2007).

The second principle, that the service provider is put at arm's length and that members are active and equal *participants*, and not patronized as clients, customers, patients or students, by service providers, teachers, (or women) seems to apply as well. This is very surprising, since the Danish Sheds are actually the result of a carefully planned men's health intervention, with health experts, national and local government, municipal health care and a host of other organizations backing it, clearly expecting a pay-off in terms of better health and lower health care costs. Unexpectedly, the national and municipal coordinators are women. A top-down initiative interested in a measurable pay-off is also anathema to the third principle, that Sheds be organized bottom-up and not be subject to any specified target goals.

So how come it seems to work anyway? The explanation might be that the staff from Forum for Men's Health began by visiting the International Men's Shed event in Ireland in 2014. Men's Sheds in Ireland had developed very close to the Australian model. This visit created a very clear understanding of the critically important fundamentals of Men's Shed organization. The Danish national and municipal coordinators are helpful at the start, but after the starting and member recruitment phase, the Sheds are expected to become self-sufficient. In effect, they

have followed a similar formula as recommended by the Western Australia Men's Shed Association cited earlier. The coordinators further assume a background, service position rather than as leaders. They are not involved in the daily activities of the Sheds. Leadership and self-governance is expected from the participants. Sheds in Denmark are still in their infancy, and not all of them work as well as the two we visited, according to the national coordinator, so it remains to be seen if the organizations will become self-sufficient and sustainable in the long term. Given the organizer's primary motivation in finding an efficient, as well as cost-effective way of improving men's health, it also remains to be seen if Sheds in Denmark will receive continued sponsorship should the expected benefits not materialize.

In terms of institutional theory, the regulative dimension was no obstacle. Denmark has suitable organizational forms for Sheds in the form of widely accepted, non-profit, voluntary associations, and also a purposeful system of public financing for men's health interventions. There are no legal obstacles for forming a men-only organization, and apparently no cognitive or normative ones either. But in terms of the cognitive and normative dimension, Sheds are a challenge to received ways of organizing public health interventions. It is not done in the normal, top-down manner. Instead of changing the Shed concept, it might be that the carefully crafted introduction of the Shed in Denmark challenges accepted ways of how to carry out a public health intervention – at least for older men.

Men's Sheds in Denmark are new, and evaluative studies will be needed in this and other new national contexts to draw any conclusions regarding their effects as a public health intervention. This Danish study, the first in a non-Anglophone nation, has shown some promising results, however. Foremost, it has shown the importance of keeping the original Shed organizational model as intact as possible when adapting it to a new context. In essence, it is the organizational principles that make Men's Shed work.

Men's Sheds as a grassroots initiative, traceable back to the opening of one prototypical 'The Shed' in Goolwa in South Australia in February 1993 (Golding, 2015:49-58) and one Men's Shed in Tongala, Victoria, in July 1998 (Golding, 2015:114-127) has become a successful and still expanding international movement, first in Australia and more recently

in Ireland, the UK and New Zealand and very recently to Denmark, Canada and Kenya. Golding (2015:34) examined evidence for the spread of Men's Sheds within and beyond Australia to 2015 and concluded that the same preconditions:

> *... population ageing perceived problems with men's health and wellbeing, disengagement of men from the community beyond their paid work lives, inability of conventional services to reach men and reluctance to engage in later life learning ... have encouraged subsequent adoption of Men's Sheds (including innovation and considerable reinvention) elsewhere in Australia and in other countries.*

By late 2016 there were at least 1,800 Men's Shed organizations across the globe in at least 10 countries, with around one new Shed opening somewhere in the world on average each day. The initial success of this translation to Denmark as a non-Anglophone nation is an illustration that even without the iconic, Anglophone term 'shed' in the organization name, it is possible to at least start a small number of Sheds in new national and cultural contexts via an initial, short term, top-down national policy and funding initiative backed up by a strategy for medium and longer term independence and self-sufficiency.

Conclusions and implications

Using the institutional theory metaphor of translation, we conclude that rather than translating the Men's Shed concept into something else as a result of its journey and translation from Australia to Denmark, it has travelled rather unchanged. The gender dimension travelled seemingly effortlessly. The other dimensions required adaptation on the part of the founders, and its travel might change the cognitive and normative dimension of the institution "how to design a public health intervention'. The underpinning reasons why the Australian model has gained such traction appears to lie in the close fit between the social and wellbeing needs and interests of mainly older men beyond paid work and the grassroots fundamentals of the model.

It is difficult to predict whether and to what extent the Men's Shed model will be attractive and successful in other national contexts. However, given that men's health and wellbeing statistics in many areas

of central Europe parallel widespread rural population ageing, low literacy in later life and low adult education participation rates for older men beyond work, it seems very likely that several other Men's Sheds interventions on the Australian model will follow beyond the recent Danish adoption.

Endnotes

1   'Sheds' and 'Men's Sheds' when capitalized are used interchangeably throughout our paper.

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Lifelong learning in policy and practice: The case of Sweden

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This paper describes the changes in lifelong learning policy that have taken place since the 1990s in Sweden. Policy documents regarding lifelong learning in Sweden have appeared since 1994. The first of these documents contains general recommendations with regard to lifelong learning, in both a lifelong and a lifewide perspective, concerning pre-school and compulsory school together with adult education and training. Much support for early stages in life can have a tendency to put adult education and learning in second place instead of the whole functioning well together. Regarding lifelong learning in practice, this paper will focus on popular education and study circles. The recently developed knitting cafés will also be accounted for. The paper also asks the question 'Who is getting education and learning in later life?' 'What are the criteria that will give individuals access to these possibilities' and 'What results can be expected?' The theoretical perspective taken in this paper is that social capital is a part of wellbeing, and the paper examines the extent to which this is connected to the social context.

Keywords: *lifelong learning, social capital, wellbeing, popular education, knitting café.*

Introduction

Sweden has a long history of involvement in developing lifelong learning policy (Husén, 1968). This paper investigates whether this been positive for adult education in practice. Policy documents regarding lifelong learning in Sweden have appeared since 1994. The first of these policy documents from 1994 was called *Grunden för ett livslångt lärande* in Swedish (in English, the *Foundation for lifelong learning*) (SOU, 1994). The second from 1996 contains general recommendations with regard to lifelong learning, from both a lifelong and lifewide perspective, and includes recommendations concerning pre-school and compulsory school together with adult education and training (Government Enquiry Report, 1996/1997). Subsequently, a policy for the introduction and implementation of rules and regulations for establishing a system of early childhood care and education in Sweden was introduced based on lifelong and lifewide perspectives. The policy was expounded in an Official Enquiry Report entitled *Växa i lärande* (SOU, 1997), in English *Growing in learning*, that proposed a new curriculum for children aged between six and 16 years. The initial terms of reference for this Commission required it to carry out its deliberations on childhood education in recognition that this was a constituent part of lifelong learning, with the intention of eventually establishing equivalent conditions for pre-school, primary school and after-school care. The subsequent law based on this report whose English title was *The National Curriculum for Compulsory School* covered children from one to five years of age in day care centres and centres for after school care (Utbildningsdepartementet, 1998).

In the proceedings of an International Symposium titled 'Lifelong Learning Policy and Research' (Tuijnman & Schuller, 1999) organised in Sweden, the importance of a lifewide and lifelong learning perspective was stressed and explained like this:

> *Lifelong learning could be seen as presenting an inclusive framework for the organisation of educational research, bridging research on the learning of very young children with that of young adults and senior citizens (lifelong) and spanning several dimensions of living experiences distributed in time and space (life-wide). Such an inclusive framework would have implications for structuring educational research and its relationships with other fields of study. (Tuijnman, 1999:8)*

Much support for education in the early stages in life can have the effect of relegating adult learning and training into second place instead of the whole system functioning well together. According to the common Swedish interpretation of lifelong learning, adult learning and training is a part of lifelong learning, but in many parts of the world, lifelong learning is seen as the equivalent of adult education. This paper also asks the question, 'Who is getting education and learning in later life?' 'What are the criteria that will give individuals access to these possibilities' and 'What results can be expected?' Some people go to university for courses, but this paper will focus on those who participate in popular education and the 'bottom-up' study groups – focussing on the case of knitting circles.

The theoretical perspective underlying this paper views the lifelong learning process as closely connected with the social economy (Boström, 2003. Lifelong learning was first connected to human capital (OECD, 1999), but since 2000 there is growing evidence of the increasing impact of social capital on lifelong learning (Schuller *et al.*, 2004). Social capital is now related to quality of life and wellbeing (OECD, 2001). Therefore, the background for social capital as well as wellbeing will be accounted for first and a model will be proposed for how social capital can be seen as part of wellbeing. Then the part of adult education that is most accessible to all older adults, at least in theory, popular education, is described and a recent evaluation of participants aged 65+ years in study circles is accounted for and compared with the recent developed knitting cafés/circles.

Lifelong learning and social economy

The place of lifelong learning in society can be illustrated as shown in Figure 1. The vertical axis shows the lifelong learning perspective from birth to death. The horizontal axis shows the lifewide learning perspective with formal learning to the left and informal learning to the right in the model. The social economy and its relation to lifelong learning are also shown in the model. The social economy is to be found on the right-hand side of the diagram, where informal learning takes place. This is where the voluntary sector is akin to the civil society The benefits of the voluntary activities became known and appreciated by the state and enjoyed regular funding 1947 (Edquist, 2015). When the organisers of the voluntary activities accepted subsidies they also had to

accept certain regulations for their organisations. The result is that these voluntary activities are moved to the more formal side in the model.

Figure 1: *Social economy in the lifelong learning perspective (Boström, 2003)*
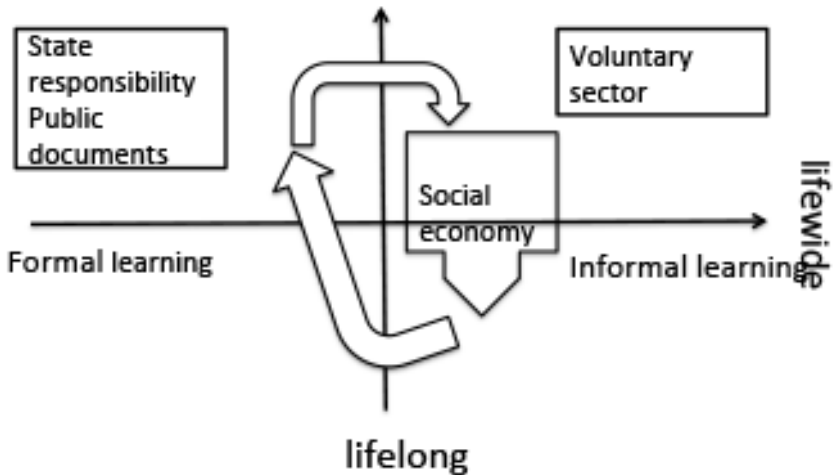
Social capital

The concept 'social capital' has been used by researchers from different disciplines. For example it was used by Putnam in political science (Putnam, 1995; 2000), Coleman in educational sociology (Coleman, 1971; 1988; 1990) and Fukuyama in economic history and sociology (Fukuyama, 1995; 2000). For most theorists, social capital is defined in terms of networks, norms and trust, and the way these allow agents and institutions to be more effective in achieving common objectives. Social capital is generally understood as a matter of relationships, as a property of groups rather than the property of individuals (Schuller *et al.*, 2004; Onyx & Bullen, 2000).

According to Coleman (1988; 1990), social capital is not to be regarded as a single entity. The most important elements of the concept of social capital are trust, communications, norms and structure. These features can be found simultaneously in any context where individuals are working towards a common goal, one that is recognized as worthy and worthwhile by the group as a whole. Hence, social capital may be nurtured and developed through co-operation between individuals.

Further, social capital is found both at micro levels, in the form of personal relationships between people and in democratic societies, at macro levels (Putnam, 1993). Social capital as a concept has been used in connection to wellbeing (OECD, 2001).

Wellbeing

There are different definitions of wellbeing but the definition that will be used here is the same as the World Health Organization (1997) defined quality of life:

> *An individual's perception of their position in life in the context of the culture and value systems in which they live and in relation to their goals, expectations, standards and concerns. It is a broad ranging concept affected in a complex way by the person's physical health, psychological state, personal beliefs, social relationships and their relationships to salient features of their environment. (ibid. p 3)*

The third wave of Eurofund's European Quality of Life Survey (European Commission, 2013) was conducted in 2011-2012. The report goes beyond the use of reported life satisfaction to consider a full range of subjective wellbeing, including *hedonic* well-being (short-term feelings), *eudaimonic* wellbeing (how people are functioning in their lives) and satisfaction with different aspects of life. The results showed that face-to-face contact with friends had a strong impact on wellbeing, while indirect contact (by phone or email) had almost no impact. The strongest predictors of wellbeing were material deprivation, health, work-life balance and lack of time, and satisfaction with public services. Wellbeing as a concept is cited as early as 1993 in the Treaty on the European Union (European Commission, 2013). However, it was not until 2006 that it began to appear more explicitly in EU policy rhetoric, when the European Sustainable Development Strategy cited the wellbeing of present and future generations as its central objective (European Commission, 2013). In response, Eurostat commissioned work in 2007 (European Commission, 2013) to scope the feasibility of wellbeing indicators at the European level. In recent years attention has begun to move from the measurement of wellbeing to its use to inform policy, a process that includes this report (European Commission, 2013).

- The framework for conceptualizing subjective wellbeing and its three main aspects – *hedonic* wellbeing, evaluative wellbeing and *eudaimonic* wellbeing has been adapted to include social capital by the author adapted from Thompson and Marks, 2008. (Boström, 2014), see Figure 2.

- Hedemonic wellbeing refers to people's day-to-day feelings and moods.

- Evaluative wellbeing asks people to report how satisfied they are with their lives as a whole nowadays.

- Eudemonic wellbeing – refers to a range of concepts believed to be important to wellbeing including a sense of autonomy, relationships, meaning and self-esteem –sometimes they are understood as preconditions to wellbeing.

Figure 2: *Social capital as part of wellbeing (Boström, 2014, adapted from Thompson & Marks, 2008)*
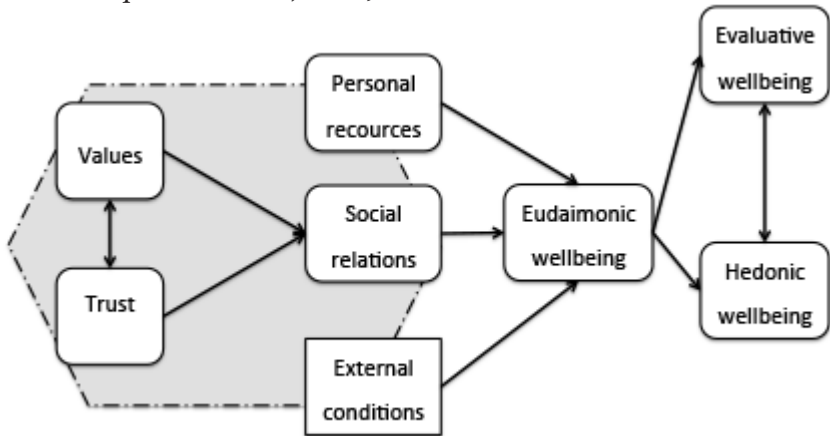
The author of this paper suggests an additional component in the conceptual model of measuring wellbeing (see Figure 2). "Social relations" is part of the model and this is important for the concept model of wellbeing. Social capital as a concept involves relationships, but values, communication and trust are also important entities in the concept of social capital. Therefore, the boxes including values, trust and social relations in the model can be seen as containing the inclusive concept of social capital. This is the shaded part of the model and

shows social capital in the context of wellbeing. This model illustrates the idea that social capital is connected to the perspectives of 'external conditions' and 'personal resources' held by the individual.

Popular education

Popular education, folkbildning in Swedish, is regarded as an example of democracy and social equality in action in Sweden. Edquist (2015) has undertaken an analysis of Swedish popular education from 1911 to 1991 and gives the historical background:

> *Popular education is –at least in political and scholarly contexts – considered a free form of education, independent of the state, and a non-hierarchical arena outside the regular public school system. In reality, popular education institutions do not always fit into that ideal, and the same can be said regarding their level of independence from the state. Government subsidies have largely shaped the size and content of these educational institutions. In 1872, owing to a parliamentary decision, folk high schools received regular funding, followed by public lectures in 1884, public libraries in 1905 and study circles in 1947 ... However, the subsidies were conditioned as a number of demands had to be filled in order to receive the funds. (Edquist 2015:74)*

Edquist concludes that study circles were the most favoured of the four parts of popular education. The definition of a study circle was first defined in 1947 as "a ring of comrades for common or theoretical or practical studies over a specific subject following a pre–arranged plan" Edquist 2015:80). Later in 1963 the definition became "a ring of comrades for common studies according to plan over a pre-specified subject or problem area" (Edquist 2015:80).

The state demanded the creation of study associations to maintain the administrative and economic organisations of study circles in 1912. Since then study circles have been an important part of adult education for older adults in Sweden (Rubensson, 1996; Laginder, Nordvall & Eriksson, 2013). Sweden has now a number of nationwide adult education associations whose activities above all comprise study circles, though they also engage in cultural activities. There are 11 adult education associations that qualify for State grants. The largest of them is the Worker's Educational Association (ABF), which accounts for

one-third of all activities. ABF belongs to the labour movement: other adult education associations are also affiliated to political or trade union movements or to popular movements, such as churches or the temperance movement.

Most people taking part in study circles are already involved in the community - for example, working in diverse voluntary associations. The study circle usually involves the participants during 10 sessions, each of about three hours, often in the evening. Participants pay a fee – even if it is inexpensive - and contribute to the coffee break often with home-made cakes. There are many different subjects, some involving quite formal learning such as language, but also cultural subjects such as knitting, painting and music.

Popular education as a part of lifelong learning has a long tradition in Sweden. As a mostly bottom-up movement there are traditions and regulations that to a greater or lesser extent have an impact on the activities. In the official report of the 1920 popular education committee, 'free and voluntary popular education was defined as open for everyone regardless of class and educational background' (Edquist 2015:81) and it was stressed that popular education aimed at 'grown-ups' and was different from comprehensive school.

Evaluation of study circles

There is now substantial evaluation of popular education available in Sweden (Andersson *et al.*, 2014) and it is possible to identify what people age 65+ years think of the learning of knowledge and skills that takes place. The 2012 evaluation sought to answer these questions based on national data bases, focus group interviews and a survey involving study circle participants who were 65 years old or more. In the study circles, 36 per cent were older (at least 65 years old), which means that over a quarter of a million older Swedish people participated in study circles in 2012, 70 per cent of whom were women. The proportion of study circle participants in the age 65+ years has increased steadily over the last twenty years. Sweden has a population of almost 10 million people, of whom 19 per cent or around 1.9 million people are 65+ and of these 18 per cent or about 340,000 participate annually in study circles. Two-thirds of these older study circle participants were found in study circles organised by ABF and Studieförbundet Vuxenskolan, which organizes courses for organisations for retired people.

Educational level

The background and educational level varies among older participants in study circles. About three out of 10 had not completed upper secondary education and about four out of 10 had only two or three years of upper secondary education. Of the participants 65 and over who took part in study circles during 2004, 55 per cent were women. Four years later the percentage of women participating was 65 per cent. For study circle participants aged 65+, study circles have an important function of enabling them to be able to study in a systematic way. Many participants in study circles had not previously had many opportunities to study. Study circles can therefore compensate for deficiencies in schooling.

Figure 3: *Proportion of participants in study circles 65+ (from Andersson et al., 2014)*
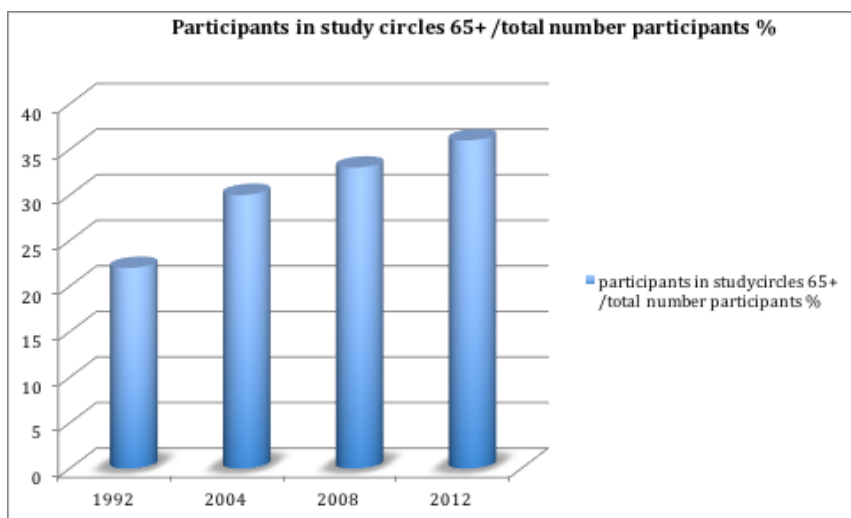
In popular education, folkbildning in Swedish, there are clear historically entrenched ideas and motives for supporting activities that benefit culture and democracy. Popular education therefore has a role to play both at the individual and the societal level in Sweden. The evaluation (Andersson *et al.*, 2014) summarizes the state's objectives in that these institutions focus on contributing to increasing the opportunity of all citizens to participate in various aspects of social life

on an equal and democratic basis. It was found in Andersson et al., 2014 that study circle participants aged 65+ voted in elections to a greater extent (90%) than the same group in the population as a whole (84%).

Figure 4: *Increased wellbeing for participants in study circles, (from Andersson et al., 2014)*
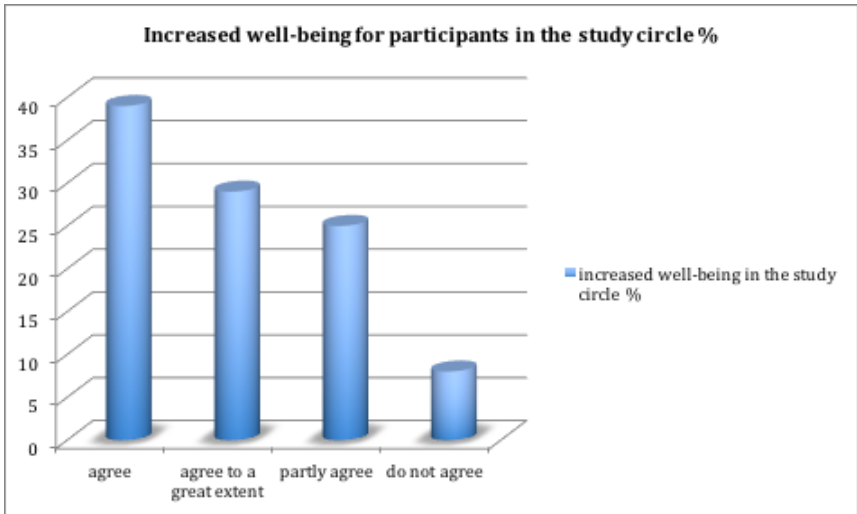
Andersson *et al.*'s (2014) study also showed that study circle participation often led to increased feelings of happiness and wellbeing (90% agreement) and that some people felt more confident as persons (25% agreement).

Many study circle participants also believed that circle participation made them better at working together (30% agreement) and better at listening (40% agreement), skills that can be said to strengthen their ability to be active citizens. Two-thirds of the older study circle participants stated that their study circle participation, regardless of the subject, had positively influenced their creativity. Two thirds of the participants felt that there was increased social capital in the study circle since they were working toward a common goal and had good social relations within the group. This often expanded to new relationships and friendships after the end of the study circle.

Figure 5: *Proportion of study skills participants who experienced self-increased wellbeing (from Andersson et al., 2014)*
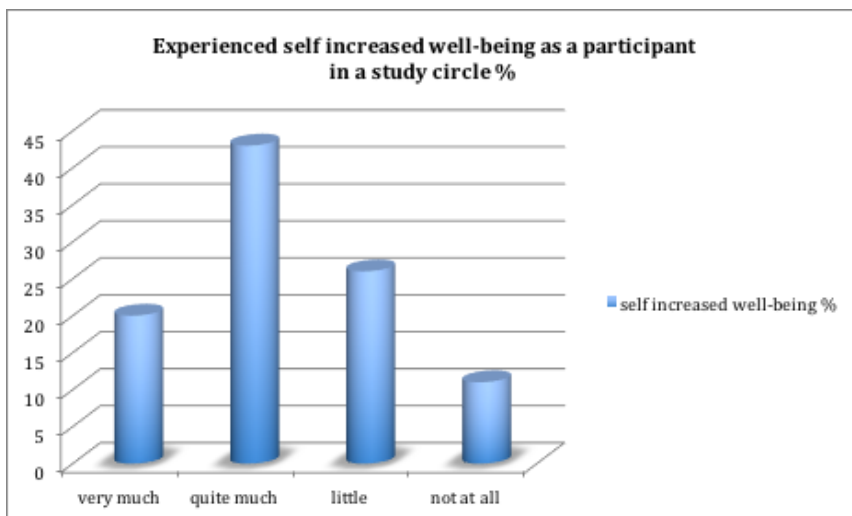
The study circle experience is seen in Andersen *et al.*'s (2014) study as largely positive. Most study circle participants aged 65+ felt that they had gained knowledge and skills, increased their social network and had participated in meaningful activities.

Knitting circles

Recently there is a new type of study circle taking place in Sweden. It is called the 'knitting circle' or knitting café. In Sweden knitting circles or knitting cafés are developing all over the country. Participants meet in a wide range of locations. It could be locations including bars, cafés, libraries and knitting shops. Those who enjoy knitting go to a meeting that is flexible without a participant register or participant fee. In Sweden some knitting courses are constructed as study circles but there are over 50 other knitting cafes whose details are published on the internet - many of them on the Tant-bloggen website (Tantbloggen, 2016). There is some recent research about knitting and its impact on individuals as well as on the social setting of several persons participating in a knitting group.

Rosner and Ryokai (2008) conducted interviews with 17 knitters. Six central themes were identified in their analysis. Most knitters

considered their craft portable and they could knit in a variety of places. They worked both on small projects and large pieces that take a longer time. They were mainly motivated either by making a gift for someone or doing something according to the weather. Knitters not only enjoy the product of their activity; they also enjoy the process. In Rosner and Ryokai's (2008) study, knitters wrote down notes on paper to record how they had made their projects and the knitting activities that took place in both personal and social space.

Knitting provides people with opportunities to socialize with others. At the same time, knitting and crochet have a calming effect and create a "relaxation response" for the individual, that can help manage anxiety and may even help conditions such as an asthma or panic attacks (Corkhill *et al.*, 2014). Riley, Corkhill and Morris (2013) undertook a global online survey about knitting. They achieved a total valid response of 3,514 from 31 countries worldwide. The respondents were asked to list their four main reasons for knitting. They identified perceived psychological benefits that came from the process of knitting, such as relaxation, stress relief, and its therapeutic and meditative qualities. Knitting helped them feel productive at the same time being an outlet for creativity. The knitters also felt calm after the soothing rhythm of the repetitive motion. Knitting in a group was also perceived as encouraging further skill acquisition, both knitting skills and other transferable skills like learning new patterns using reading and counting and learning social awareness of other participants in the group. Attending a group enhanced knitting work as an individual activity. Knitting enabled the introvert to feel more comfortable in a group setting. The knitting group also provided a level playing ground where those disadvantaged and advantaged in life could meet as relative equals.

The benefits of study circles and knitting circles

Study circles can contribute to the wellbeing of the individual both in terms of hedonic and eudemonic wellbeing as well as by an increased social capital in their social relationships in groups. The same could be said about knitting and the knitting cafes. While study circles seem to be a system that fits the Nordic countries, the knitting café can be found in several countries around the world (Riley *et al.*, 2013). The study circles have been included in the education system in Sweden, although they are not formal in the way that they give degrees and there

are no examinations. An example of the differences between knitting
in a study circle and a knitting café are shown in Table 1. The costs
are from the courses programmes from Studieförbundet vuxenskolan,
Folkuniversitetet and Medborgarskolan (2017). Varberg is a small town
on the west coast and Stockholm is the capital of Sweden. The example
of the yarn shop is from Stockholm (Garnverket, 2017). The study circles
have a participant cost (Swedish krona, SEK) and are organized for the
registered participants during specific times while the knitting café is
open for all and free of cost.

Table 1: *Difference between knitting in a study circle and
participating in a knitting café*

	Varberg	Stockholm	Yarn shop	Knitting café in yarn shop
Cost in SEK	850	A) 940 B) 1050	350-2350	0
Time	Three hours/ five weeks	A) Four hours/one week B) Five hours/two weeks	Two and a half hours/ five weeks	Open twice a month/two hours
Participant register	Yes	Yes	Yes	No

The study circle could be found on the left side of the model of social
economy because their organizations and structure is regulated to a
certain extent (see Figure 6). The knitting cafés, on the other hand, are not
regulated in any way so these can be found to the right side of the model.
This illustrates the tension between the idealized popular education and
the organized popular education in practice.

Figure 6: *Popular education and knitting cafés in the social economy.*
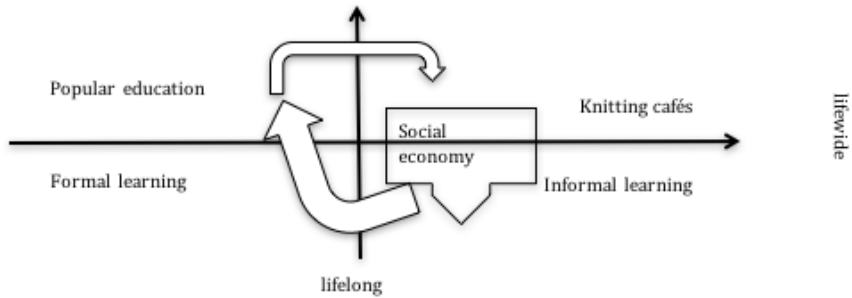
By his analysis of the popular education, Edquist (2015) found that a tension had developed between two parallel notions of popular education. One was the idealised popular education that stresses non-formal learning and independence. The other was the organised popular education – that receives state subsidies and adapts to state regulations.

Discussion

The rhetoric surrounding lifelong learning policy suggests that all forms of education and learning should receive equal attention of education and learning. In the case of Sweden the focus was, from the beginning, on adult learning (Husén, 1968), especially non-formal vocational education and learning. During the 1990s national policy documents were directed toward pre-school and afterschool care. The Swedish Education System has been through a difficult period with falling academic results both in literacy and mathematics and the shifting interest towards compulsory schooling. This has led to a major evaluation of the Swedish educational evaluation system (OECD, 2013). As study circles are a part of the educational system, they were also evaluated (Andersson *et al.*, 2014).

Lifelong learning in practice has shown benefits for society in the form of increased wellbeing in study circles and in knitting cafés. The tension between "ideal" study circles and "organisational" study circles that Edquist (2015) found is still a reality in the Swedish society, as the funding forces adult education associations to organise the study circles according to the state regulations. It remains to be seen if the knitting

cafés will keep their independence or if there will be a movement towards organised forms of these circles too.

Conclusion

This paper examined the Swedish education system with a special focus on popular education and study circles. The tension between the organisational study circles as more formal and bureaucratic and the knitting cafés that are to a greater extent informal and independent, has been described. Still, participants of both kinds of circles enjoy increased wellbeing and social capital and the circles are open to all participants, helping to counteract social inequalities and encouraging possibilities of learning in later life.

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Opportunities for generativity in later life for older men

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The changing social and economic landscape across European Member States and beyond has had a disproportionate effect on older adults. Nowhere is this more keenly felt than among the "buffer generation" of men caught between the silent, strong, austere masculinity of their forefathers and contemporary society—progressive, open and individualistic (Wyllie et al., 2012). In most countries, men have shorter life expectancies than women and higher mortality rates from most common causes of death. This imbalance arises from issues broader than disease related mortality, with post-industrial society seen to have reduced opportunities for men with regard to work and full time employment, further compounded by dispositional barriers to learning (European Commission, 2011). This paper presents findings from a mixed methods study of 297 older men participating in community-based Men's Sheds in Ireland and particularly explores the contributions generativity through Men's Sheds makes to the well-being of older men. The findings show men giving back to the community in different ways, including through the sharing of skills and experiences. It is argued that community-based Men's Sheds provide opportunities for generativity, with identifiable health benefits for older men, holding important lessons for policymakers to enable greater visibility of men's perspectives.

Introduction

The 2010 Global Burden of Disease study led by the Institute for Health Metrics and Evaluation confirms that, in most parts of the world, health outcomes among boys and men continue to be substantially worse than for girls and women, yet this gender-based disparity in health has received little attention from policy-makers or service providers (Wang, Dwyer-Lindgren & Lofgren *et al.*, 2012). The study highlights how women had a longer life expectancy than men throughout the period from 1970 to 2010, having increased from 61.2 to 73.3 years, whereas male life expectancy rose from 56.4 to 67.5 years. The European Commission's report on *The State of Men's Health in Europe* (EC, 2011) draws attention to marked gender differences in health which confirm that men's health disadvantage is not simply biological but also shaped by culture and socioeconomic conditions. It argues that the strong gendered dimension around lifestyle choices and risky behaviours of some men which increase their risk of ill health relative to women must be seen within the context of economic, social, environmental and cultural factors. In all Member States, men who live in poorer material and social conditions are more likely to smoke, eat less healthily, exercise less, be overweight/obese, consume more alcohol, engage in substance abuse, and have more risky sexual behaviour. Gendered patterns were also found for depression and other mental health problems, with women much more likely to acknowledge problems and seek help and men more reluctant to discuss problems and less likely to ask for help. One consequence of this is that, although more women in Europe are diagnosed with depression and anxiety, more men commit suicide and engage in behaviours which are detrimental to their health (EC, 2011).

Previous research confirms the relationship between low socio-economic status (SES) and higher prevalence of depression in men. Longitudinal evidence, compiled over a seven year period, found that a lowering in material standard of living is associated with increases in depressive symptoms and cases of major depression (Lorant, Croux and Weich, *et*

al., 2007). When comparing unskilled manual workers with skilled non-manual workers, occupational class was found to be strongly associated with the onset of depression in men (Kosidou, Dalman, Lundberg *et al.*, 2011). Looking specifically at differences in risks between men and women, Kendler and Gardner (2014) found perceptions of deficiencies in caring relationships and interpersonal loss to be the strongest predictors for depression in women while for men, failures to achieve expected goals relating to employment, financial and legal issues were found to pose the greatest risk. On balance therefore, it seems that for some men having an occupation gives a sense of meaning and purpose, and the feeling of being useful. Yet surprisingly limited attention has been given to the implications of this in terms of interventions to preserve meaning and purposefulness for men, especially during times of transition such as from paid work to unemployment or retirement.

The present study uses Eric Erikson's concept of generativity to examine the role of community-based Men's Sheds in supporting the well-being of older men. In 1950, Erikson's framework of human development outlined eight stages from infancy to late adulthood. He theorised that all human beings go through these same eight life stages and that each stage has two opposing outcomes. Of central importance here is the seventh stage of development, said to occur between 40 to 64 years of age. According to Erikson (1982:67), the opposing outcomes of this stage are concerned with *generativity vs stagnation* or '… a widening commitment to take care of the persons, the products, and the ideas one has learned to care for'. Where individuals failed to develop a concern to become a productive or creative member of their community, Erikson held that "a pervading sense of stagnation, boredom and self-impoverishment" would result (1968:138). While remaining the dominant concern of middle adulthood, Erikson accepted that the generative desire to be a productive or creative member of society continues throughout the remainder of the lifespan (Fleming, 2004).

Evidence of the significant contributions older people make to communities through volunteering and civic engagement (Gonzales, Matz-Costa & Morrow-Howell, 2015) and the importance they place on recognition of their contributions (Lee, 2006) would certainly seem to support Erikson's supposition. Nonetheless, the level of social connectedness varies significantly by gender as do perceived benefits. Compared with men, women have larger social networks, are more

emotionally involved with members of their network, and are more sensitive to adversities experienced by their network (Kendler & Gardner, 2014). By contrast, Kendler and Gardner conclude that men are more emotionally involved in occupational and financial success and are more sensitive to perceived failings in these areas. In addition, men have less experiences of socialising outside the home, except with regard to socialising in the local bar or attending football matches or other such events, leaving them with less well-developed social networks in later life (Carragher, 2013).

Older men have lived their lives largely according to traditional masculine values of breadwinner and provider and have been socialised to be self-reliant, making it more difficult for service providers to engage with them and gain their cooperation (Walsh, O'Shea & Scharf, 2012). The majority of social groups and organisations that offer opportunities for people to be creative and to flourish have been established largely by women and are used largely by women (Carragher & Golding, 2015). Available evidence on membership of active retirement groups suggests they are dominated by women and the activities provided are of little interest to men (McKenna, 2009: Ni Leime, Callan, Finn & Healy, 2012). The one documented departure from this status quo has been the development of the Men's Sheds movement. This has seen an increasing number of men coming together to participate in activities in a social space. So what are Men's Sheds, why do men participate and what do they get out of it?

The Men's Sheds movement started in Australia in the mid-1990s and spread rapidly to other countries, including Ireland where the first such organisation opened in 2009. Men's Sheds are community based non-commercial organisations that provide "a safe, friendly and healing environment where men are able to work on meaningful projects at their own pace in their own time in the company of other men" (AMSA, 2016). Men's Sheds typically have a workshop space for tools and equipment and a social space for "tea and a chat" (Carragher & Golding, 2015). In this social space, men commonly participate in wood-work activities and, to a lesser extent, in other activities such as painting and cooking. Activities are decided by the men and largely provided by them through the sharing of skills, unless a particular skill-set is not available and in this case an outside tutor is sourced (Carragher, 2013). The Irish Men's Sheds Association (IMSA) argues that, although activities provided in

Men's Sheds are not typically formal training programmes, '… men gain new knowledge and skills from taking part [in them and although] … not a health programme … health and wellbeing does improve for men taking part, by keeping them physically, mentally and socially active; connected to their community and the world' (IMSA, 2013:3).

The model underpinning activities in Men's Sheds shares a similar ethos with a social action understanding of community education. This "values and draws on the lived experience of participants in the learning process…builds the capacity of groups to engage in developing a social teaching and learning process that is creative, participative and needs-based" (AONTAS, 2013). Yet in practice, community education programmes have not attracted significant numbers of men. Indeed, men account for just 25 per cent of participants of community education in Ireland (Community Education Facilitators' Association, 2014) and similar patterns have been identified elsewhere (McGivney, 2004; Golding, Brown, Foley, Harvey & Gleeson, 2007). By contrast, the number of Men's Sheds is increasing in Australia, Ireland, New Zealand, Canada, Scotland, England, Wales and Denmark. The present study is thus timely and will add to literature which seeks to support a better understanding of this male phenomenon. It explores Men's Sheds in Ireland, currently standing at 400, which is a higher density per head of population to that found in Australia (B. Golding, pers. comm.) and the importance of generativity through Men's Shed for the well-being of older men (aged 50+ years).

Method

To overcome the limitations of a single method alone (Ponterotto, Mathew & Raughley, 2013) and to give a voice to participants, a mixed methods design was used, involving questionnaires and focus groups. The addition of focus groups was intended to ensure that the findings were grounded in real life experiences (Wisdom & Creswell, 2013). The survey design and research protocol were shaped by similar research in Australia (Golding *et al.*, 2007; Golding, Foley, Brown & Harvey, 2009), with minor changes made to suit an Irish context. Two survey instruments were used; one to elicit information about sheds, such as location of Men's Sheds, funding source, management etc.; the second to elicit information about participants of Men's Sheds, such as the reasons for and outcomes of participation.

Demographic questions were designed to identify common characteristics of those who typically attend Men's Sheds. In addition to age and educational background, this included questions about participants' personal lives and relationships; marital and cohabitation status, family make-up (e.g. father, grandfather) and significant life events experienced in the past five years (e.g. separation, unemployment, retirement, a significant loss, a major health crisis, a new personal relationship, a new child or grandchild). Closed-ended questions were used to elicit information about the learning activities in Men's Sheds (e.g. "If more learning opportunities were available through this shed, would you be interested in taking part?" "Yes/No"). Multiple choice questions were used to determine preferences for learning (e.g. "If yes, which type of learning would you be interested in?" "A course to get a qualification; Special interest courses; In a small group; Field days or demonstrations; In a class; Through the Internet; By taking on responsibility; Through preparation for further study; Where I can meet other people; [and] Individual tuition").

Additional questions were presented as statements and invited respondents to indicate the extent to which they agreed or disagreed with these statements, from *strongly agree* to *strongly disagree*. These were not mutually exclusive but rather were designed to identify reasons for participation in Men's Sheds (e.g "I am doing what I really enjoy; To be with other men; To get out of the house; To learn new skills" etc.) and outcomes from participation (e.g. "a place where I belong; I get access to men's health information" etc.). Multiple choice questions were added to explore learning in Men's Sheds (e.g. "There is too much emphasis on learning things I can already do; "My skills are already good enough for me to be able to take an active part in this organisation; "There is too much importance placed on formal learning" etc.).

The approach to fieldwork was deliberately "interpretive and naturalistic" with focus groups held in "natural settings to help make sense of phenomena and the meanings people bring to them" (Denzin and Lincoln, 2000:3). In all, a series of five focus groups were held in different Men's Sheds on completion of survey analyses. These provided valuable opportunities to observe the activities and interactions in Men's Sheds, how men engage with each other and how they share skills with each other. Focus groups lasted approximately 90 minutes and collectively involved 40 consenting adults, with conversations recorded

and transcribed verbatim. Field notes were used to aid transcription and proved important for clarity of transcriptions when more than one person spoke at a time. Ethical clearance was granted by the researcher's institution before fieldwork commenced. All Sheds registered with the IMSA were invited to participate, but the actual number of surveys distributed were determined by the coordinators of Sheds in line with membership. In all, 445 questionnaires were distributed.

Results

Some 347 questionnaires were returned out of a possible 445, including 50 incomplete questionnaires. When the incomplete questionnaires were excluded, the sample size was 297, giving a response rate of 65.2 per cent. All respondents were male, with the majority aged 50+ (71%, n = 210). Most were married (70%, n = 207) or had previously been married and 58 per cent (n = 172) were currently living with their wife or partner. Nearly three quarters were fathers (72%) and nearly half were also grandfathers (45%). The majority were retired from paid work and in receipt of some type of pension (53%), with just 15 per cent currently in paid work. Just over half had no formal qualifications (51%) and were educated to primary or secondary school level only. In a separate question, 45 per cent identified themselves as a current or former tradesman.

Evidence of generative acts

Generativity means generative behaviours which include "creating, maintaining, or offering" (McAdams & de St Aubin, 1992:106). This creation or offering represents an extension of oneself, rather than being merely an act of altruism alone (De Medeiros, 2009). In the context of Men's Sheds, the hands-on learning through sharing skills and experiences, and the giving back to the community through voluntary work, reflects the generative concerns of older men for both future generations and their own individual legacies. In keeping with this interpretation, taking part in activities in Men's Sheds in the company of other men encouraged creativity, with woodwork and metalwork consistently providing opportunities for older men to experience creative tools and to be productive. For many, the skills to make and repair were as important as their ability to think creatively. The top preferred activites were related to men's hobbies, including woodwork

(75%) and technical trades and crafts (68%). The confidence with which respondents took part in related activities was succinctly expressed by one man in the following way:

> *I could take an engine out, pull it apart and throw it over there and come back next week . . . and put it back together again. And I learnt all of that myself. I never went to school to learn any of that. I never read a book about it or anything.*

Motivation for the social process involved in generative behaviour and generative acts is important. The findings suggest that for men participation in Men's Sheds is driven by a need to be doing meaningful activities in the company of men. This was expressed as a need "to get out of the house" (95%), "to be with other men" (95%), a preference for "hands-on learning" (71%) as opposed to "learning in classroom situations" (29%), and by a desire to "improve skills" (94%) through "more learning in Men's Sheds" (97%). As one man said:

> *... the benefits I get from this shed is health ... meaning I'm not down in the house vegetating, I'm here vegetating. But at least when you're here vegetating you can talk to somebody.*

For a significant number of men (83%), access to male health information was also an important motivation for participation. In addition to organised health talks and leaflets, the men offered each other mutual support and health advice as the comments of this man suggest:

> *You'll get a man who'll say, "I'm taking a tablet [medication]," and you say, I'm taking the same", and he'll say, "What are you taking it for? Once one starts ...*

The findings point to generative acts through Men's Sheds to communities which also foster generative networks and mental well-being. Mental capital has been described as 'a dynamic state in which the individual is able to develop their potential, work productively ... build positive relationships with others ... and contribute to their community' (Foresight Mental Capital and Wellbeing Project, 2008). Thus this study found that over three-quarters (79%) of Sheds surveyed were involved in charitable or voluntary activities beyond their main purpose or activity. This made respondents feel productive and valuable to their community and they expressed this as "I feel better

about myself" (97%), "I feel happier at home" (74%), "I can give back to the community" (97%), "I feel more accepted in the community" (86%) and "I have a place where I belong" (95%). In contrast to the low participation rate of men in traditional social groups in the community and in community educational programmes, the findings shows that older men regularly participate in Men's Shed-based activities, with the majority (91%) taking an active part in the learning opportunities, sometimes on a daily basis (12%), sometimes *several times a week* (29%) or *at least once a week* (50%).

Evidence of stagnation

Where generative concerns or acts are prevented or not enabled, it is likely that older men will give up on being productive or creative, with stagnation prevailing over desires for generative behaviour. Evidence of stagnation was found with respondents complaining that opportunities for learning elsewhere in communities were limited (70%), that there was no place locally which they considered a good place to learn (79%), that there were not enough learning situations where men were encouraged (68%), not enough male tutors (57%), and nothing that men really wanted to learn (91%).

The findings confirm that few men had attended any sort of formal learning programme in the past year (19%), and two-thirds (66%) reported having negative educational experiences in school. This was expressed in different ways, such as '... so far as school is concerned it never taught me very much at all' and 'I left school at 14 and what I know now I learnt it along the road'. For some men, school taught them the basics but life taught them the important things ... 'when we were there we got the basics, as I say the reading, writing and arithmetic'. One man referred to his learning from the 'school of hard knocks', commenting that 'you have so many knocks in life as you came along that you were taught by your knocks, you were taught by experience. If you walked along and you fell down that road you won't do it again'. Collectively the men had experienced a range of recent, debilitating major life events, including a significant loss (24%), a financial crisis (23%), unemployment (41%) and depression (23%).

Limitations of the study

This is the first study of Men's Sheds in Ireland and, as it is a recent

phenomena in Ireland, it is conceivable that those Sheds that have been open longest may have been more motivated to take part in this study. However, this study nonetheless provides important information on why men participate in Men's Sheds and what they get from their participation, paving the way for further studies including more qualitative cases studies.

Discussion

The findings from this study arguably demonstrate the need to further explore the emergence and impact of generative acts and behaviours in the context of Men's Sheds. Until recently, men showed relatively little interest in availing themselves of opportunities to engage in learning. Yet as we have seen, men are now engaging in learning, in being creative and in giving to communities through the Men's Sheds movement in ever increasing numbers (Golding, 2015). So why are they doing so and what does it mean for policymakers and services providers? The findings from this study suggest the appeal of Men's Sheds is first and foremost that Sheds offer men a productive environment that validates their role and recognises their contribution. They offer peer support and foster peer social networks through hands-on activities as they share and reapply life skills and resources with each other. It is noteworthy that while almost all Sheds (97%) agreed that their members were "mainly men", the sample for this study comprises only men. Quite simply, Men's Sheds provide meaningful spaces for men to be with other men and to be productive through activities that they can relate to and take pride in.

The fact that they are mostly older men aged 50+ years is also likely to be important. Men of this generation have a lot in common with each other and little in common with younger men. These mid-life and older men are "caught between their traditional silent, strong and austere fathers who went to work and provided for their families, and the more progressive, open and individualistic generation of their sons" not knowing which of these two very different ways of life and masculine cultures they should follow (Wyllie, Platt, Brownlie *et al.*, 2012:12). The pressure to live up to a 'masculine gold standard' which 'prizes power, control and invincibility' means having a job and providing for the family is central, especially for working class men. Wyllie et al., 2012) suggest that personal challenges such as losing a job can have much more of an emotional impact on older men than might be the case for

women because, as the evidence confirms, women are much more open to talking about emotions than men of all ages and social classes. In the face of mounting evidence of men's health disadvantage relative to women, we can therefore no longer ignore nor deny the social, environmental and cultural factors which influence the lifestyle choices and risky behaviours of some men and increase the risk of ill health relative to women.

Services in the community have not reached out to men in meaningful ways, but the drive for gender equality and the introduction of national programmes for men in some countries suggest this may be changing. Ireland has just launched its second health strategy, the *National men's health action plan: Healthy Ireland – Men* 2017-2021 (Department of Health & Children, 2016). Supporting men's health and wellbeing is also a part of Government's plan to implement the national framework for action, 'Healthy Ireland' (Department of Health, 2013) and of the 'Connecting for Life' Suicide Strategy (Department of Health, 2015). To this end, the 'Sheds for Life' initiative will receive €226,000 from the Health Service Executive in 2017 to promote men's health by working in partnership with statutory, voluntary and community organisations to strengthen men's health, knowledge, awareness and behaviours towards health. While such initiatives are a welcomed development, the fact that men in general tend to have poorer knowledge and awareness of health than women means we need to take a step back in order to adequately address this. To do this, we need to start the work in childhood, meaning that efforts to improve men's health must include schools where stereotypes about masculinity can be more effectively challenged to prevent replication.

Conclusion

Erikson's concept of generativity provides a framework for a better understanding of the appeal of Men's Sheds to older men. These male dominated spaces provide a sense of purpose and meaning for older men, most of whom are retired or outside of work and are vulnerable after the loss of friends and family, reduced mobility or limited income. Limited social networks and limited experiece of engaging with services reflects lives lived largely according to traditional masculine values. For such men, meaning and identity are constructed around paid work and the transition from employment to retirement can be difficult. Erikson's concept of generativity provides a framework

for a better understanding of how older men find meaning and purpose in Men's Sheds and how this fosters creativity and promotes well-being. Within the Shed environment, surrounded by other men and working with their hands, older men draw on their life resources as they share skills and gain new ones. Working with their hands, alongside their peers, older men reapply their life resources in creative and productive ways which in turn promotes well-being and fosters peer bonding and peer social networks.

A related and equally important outcome concerns the meaningful conversations which take place between men as they engage in activities. The notion that men are largely disinterested in their health has been espoused by many, including health professionals. Often this transpires in comments which are "off-the-cuff" with no deliberate harmful intent but nonetheless serve to reinforce a perception which is unhelpful. This paper demonstrates that men are interested in their health and we need to recognise this and act on it. The findings show that men are interested in talking about their health and in accessing health information in Men's Sheds, which in turn provides opportunities for policy makers and service providers to deliver targeted interventions in Sheds. However, it is crucial that we do not lose sight of the importance of meaning and purposefulness, one of the main reasons why older men flock to Sheds in such large numbers. The benefits older men gain from participation and the generative behaviours which flow from this are at least as important to their mental well-being as they are to the creation of generative communities.

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About the Author

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The engagement of universities in older adult education in Aotearoa New Zealand

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This article investigates the engagement of universities in older adult education in the specific context of Aotearoa New Zealand. Initially, the broader context of the tertiary education system and the place of universities within it are explained. Not unexpectedly adult education, and particularly older adult education, exists only on the margins of the system. Significant achievements in the past in regard to universities' contribution to older adult education are acknowledged before judging the effectiveness of current engagement, using Peterson's (1976) definition of educational gerontology as a benchmark. Globally, there are adventurous moves afoot to extend the vision and practices of universities to embrace elders as legitimate partners in learning. The article explores potential engagement by reviewing some global examples including an exemplary "traditional" programme, inter-generational learning/ education, an application of the Age Friendly University concept and two solid research studies of older adult education conducted in sites in Europe and Asia. The article concludes by reflecting on the possible application of these initiatives in the New Zealand context.

Keywords: *university engagement, older adult education, ageing and learning, seniors' learning, international adult education.*

Introduction

In investigating the engagement of universities in older adult education in a specific context (Aotearoa New Zealand), there are several subsidiary questions to ponder. To what extent do the primary functions of universities as part of the wider tertiary education scene relate to the lives of older people in this country? Historically, has anything significant been achieved? What is the status of adult education in the university sector? What kinds of direct and indirect involvement of universities in third age learning exist? What should be the contribution of universities to seniors' education?

In this article I begin by explaining the broader context of the tertiary education system and the place of universities within it. Given the priorities of the New Zealand government for the tertiary sector, it is not unexpected that adult education, and particularly, older adult education, exists only on the margins. I argue that while there have been some significant achievements in the past in regard to universities' contribution to older adult education, the present scenario is less positive, primarily due to a neo-liberal regime and concomitant parsimony. Yet, should the eight universities decide to (more fully) embrace a lifelong learning agenda, the potential for worthwhile education (both direct and indirect), in conjunction with seniors, is considerable. Globally, there are adventurous moves afoot to extend the vision and practices of universities to embrace elders as legitimate partners in learning. In some cases, these initiatives may be modified for the New Zealand context, as has been the position historically, as reported by Dakin (1992). It is unfortunate but a reality that the primary motivator for future positive strategies from universities for older adults' education is financial when universities realise how neglectful they have been of a sub-population that is increasingly demanding of resources as past or contemporary tax-payers.

Universities in Aotearoa New Zealand: Their functions

The functions of universities need to be understood in the wider framework of the tertiary education system in Aotearoa New Zealand. Tertiary education is diverse, its meaning being broader than what is usually meant by "higher education". The Tertiary Education Commission (TEC), the government's arm for providing post-

compulsory education to its citizens, defines the tertiary education system as follows:

- Eight universities (all publicly funded)

- 18 polytechnics, some recast as institutes of technology in main centres

- Three whare wānanga (Māori controlled "houses of learning")

- Hundreds of Private Training Establishments (PTEs), offering such diverse programmes as English language provision, hospitality, business and religious-based institutions.

- Adult and Community Education (ACE), including prominent players such as community education in schools (now somewhat diminished through government cuts), 13 Rural Education Activities Programmes (REAPs) and adult literacy and numeracy.

Arguably, some of these agencies under the auspices of the TEC offer some learning opportunities for older people, but in the main they do not see older adults as a primary "target group". The wider priorities for the TEC are identified in areas where seniors struggle to gain visibility (TEC, 2012):

- Delivering skills for industry

- Boosting achievement of Māori and Pasifika

- Getting at-risk young people into a career

- Improving adult literacy and numeracy

- Growing international linkages

- Strengthening research-based institutions.

The above priorities of the TEC provide the essential platform for universities in New Zealand to develop their strategic plans in terms of research, teaching and community service. There is no overt reference in the TEC goals and in university charters to seniors or third age learners and it would be a struggle to convince senior management that older people have much to offer to help achieve these goals. Yet, it is evident that beneath the surface, seniors can engage in fulfilling such objectives. For instance, with respect to the goal of "delivering skills for industry", the workforce in this country is gradually extending the range of ages

of employees beyond the traditional "retirement age" of 65 years at which point citizens are eligible to acquire a modest universal pension. Many older people, whether through coercion or proactive choice, are staying in the labour market across a wide range of industries, especially working in social services (Rothwell, Sterns, Spokus & Reaser, 2008). In "delivering skills to industry", universities continue to provide professional development and training to organisations whose membership is progressively getting older. While ageism still persists, some agencies are seeing the benefits of retaining and retraining older workers whose experience can be of high value to an industry (Phillipson, 2013). In addition, many older adults form the nucleus of a volunteer labour force (Milligan & Conradson, 2006) and universities can provide both credentials (credit provision) and continuing education (non-credit) to such workers. In summary, while the six TEC priorities on the surface do not offer much traction for older people's development and well-being, it can be argued that there are still useful connections of the priorities to the lives of third age learners.

Understanding "older adult education"

The first clarification required in regard to *education* is that the term does not capture all learning. Adult educators are usually fully aware that much significant learning occurs outside of structured contexts as part of daily life (informal) and in the involvement of elders in systematic activities of organisations in which they may be volunteers (non-formal learning). The term "education" is normally reserved for learning that is systematic, often teacher-led, hierarchically-organised and accredited (as in degree awards). In such discourse, the "education" is commonly associated with providers, policy development, assessment, and appropriate structures of learning (Withnall, 2010). Hence, older adult *education* is a narrower concept than older adult learning and is more explicitly connected with the political economy inasmuch that the provision of education is often regarded as a governmental responsibility.

A second consideration in understanding the term "older adult education" is that of defining who might be labelled *old* or *older*. Generalisations made about what constitutes *old age* should be minimalized, given that one of the hallmarks of older age is its heterogeneity (Findsen, 2005). Ageing is historically and culturally bound. In the 1900s, the age of 60 might have been considered old in New Zealand; in the new millennium,

given that life expectancy has been pushed out to around 83.2 years for women and 79.5 years for men (Statistics New Zealand, 2013), there is no firm marker. While the Government provides a pension at 65, this could hardly be considered "old". Hence, chronological age is a very crude marker for assessing who is "old". Around 40 years ago Neugarten (1976) distinguished between the *young-old* (55-65), *old* (66-74) and *old-old* (75-85) but even these parameters can now be considered obsolete as larger numbers of adults reach 100. Hence, overall, the term "*older adult education*" could conceivably apply to people beyond 55 but in the contemporary New Zealand context 65 plus seems a plausible age around which to develop education with and for older people. This is because most public policy does not begin to consider older adulthood until people reach this milestone.

A third point for discussion is that older adult education can be perceived as a subset of adult education. Is it a separate type of provision or is integrated into a lifelong learning framework where age is hardly relevant? It can be both. In the wider context of what constitutes adult education in Aotearoa New Zealand, there is a huge diversity of provision, much of which is incorporated under the remit of ACE Aotearoa. (Importantly too, there are providers of adult education, especially of a radical hue, who are not supported by TEC funding and who intend to remain fully independent). An early conceptualisation of the main fields of Adult and Community Education was provided by Tobias (1996:42) as follows:

• Adult basic education;

• Second chance education opening the way for further formal education, training and/or employment;

• Personal development education which enables an individual to live in a family, group or community;

• Cultural education which enables a person to participate in life in their community;

• Education to facilitate group and community education.

What is rather surprising, given huge societal changes mostly due to globalisation and the onset of dramatic ICT developments since Tobias's descriptor was written in 1996, is that this depiction of the ACE field is still deeply relevant. These sub-fields largely reflect the contemporary

rhetoric of lifelong learning – economic imperatives; personal fulfilment; citizenship education; social inclusion – and point to actual sites/practices where adult education can occur. For older people, adult basic education and "second chance" education have less immediate relevance (high proportions of older people in this country have achieved basic literacy; few elders enter universities beyond 65 years) but the three other domains are deeply embedded into the lifelong education culture of Aotearoa New Zealand.

It is obvious that adult education in its myriad forms is open to older people as for other significant groups in society. From a university perspective, "older adults" constitute one group of "non-traditional students" who have been historically excluded from formal education, in addition to others (e.g. Māori; the disabled; prisoners). Indeed, as an analysis of participation at the University of Waikato reveals, many of the general continuing education programmes have been attractive to older learners, especially if there is a hint of them as a possible target group (e.g. dealing with loss and grief). This observation that older people are often attracted to the general provision of adult education, does not lessen the reality that there are often obstacles of an institutional nature that work against elders' participation (e.g. inappropriate marketing; irrelevant curriculum).

Aside from ACE general provision, there are programmes constructed *with* and *for* older people to help meet their learning needs. As explained elsewhere (see Findsen, 2012), in this bi-cultural country of Aotearoa New Zealand, these might also be sub-divided into Pākehā and Māori domains. Providers differ substantially in their concerns for the learning needs of seniors. In the Pākehā context, the provision of the University of the Third Age (U3A) and Seniornet standout as exemplars of education that are designed with older adults as partners of learning. In the Māori context, much education occurs on marae (communal meeting places) where customarily knowledge, skills and values are passed on inter-generationally (Findsen & Tamarua, 2007).

Another, no less significant feature of older adult education, is to acknowledge the significant learning/education that occurs in workplaces. Much of this training and/or professional development is available to older workers, despite some discrimination based on age (Phillipson, 1998). Vocational education and training is becoming

more prominent for older people, as more of them are retained in the workforce. Sometimes older workers need to upgrade their knowledge to continue to be productive and occasionally they are in competition with younger employees who are the usual preferred targets by employers for such opportunity (Beatty & Visser, 2005). Ideally, employers will see the benefits of employing a full range of staff (e.g. age, ethnicity, gender) to better reflect the growing diversity of the general population. In brief, adult education for seniors does have an instrumental side to continue to keep their expertise and skill set updated. Further, seniors in the workforce can provide sound institutional knowledge and mentoring capabilities for younger workers (Findsen, 2014).

Older adult education: how universities have engaged in New Zealand

As a general observation, there is no distinctive pattern to the ways in which universities work with older people. Universities are multi-faceted institutions organised along discipline-related lines to carry out their primary functions (teaching, research and community service) and are often disjointed internally as a result. While the strategic plans of individual universities provide a clearer focus for directing outputs, seldom do such documents delve into more specific approaches of faculties or centres. Often more operational goals/strategies are determined at lower levels of the hierarchy to better reflect localised expertise linked to industry and community objectives. The priorities of the TEC do not focus on the learning needs of seniors so there may be little financial incentive for universities at whatever level to engage with this sub-population. Despite this reality, there have been and still are sporadic initiatives undertaken by universities. These initiatives can usefully be judged, to some extent, by referring to pioneer, Peterson's (1976) three domains of *educational gerontology*. He described the scope of the field, at the interface of adult education and social gerontology, as follows:

• Education for older adults

• Public education about ageing

• Education of (para) professionals in the field of ageing.

Discussion now focuses on the degree to which each of these priorities is or can be manifested in the work of universities.

i)   *Education with and for older adults*

Peterson's triple concentrations of effort provide a useful framework to begin to judge the effectiveness of universities to achieve success in engagement with older adult education. In earlier times education *for* older adults took precedence, often triggered by a paternalistic attitude that university staff knew better than older adults themselves what seniors might learn (Jarvis, 2001). In non-credit continuing education provision, the little programming designed with seniors in mind was characteristically of this type. As the new millennium ushered in a stronger neo-liberal regime, this pressurised universities to develop engagement with elders that emphasised seniors' self-organisation, a more "hands-off" approach. Hence, universities dabbled with support for 60 age group provision where time investment was minimised and seniors themselves undertook much of the co-ordination on a voluntary basis, akin to U3A activities.

The University of Waikato is located in the heartland of Māoridom, (the Māori King Tuheitia is based at Ngaruawahia close to Hamilton city), the spiritual base for Tainui iwi (tribe). Hence, the University has a heightened awareness of its responsibilities to Māori people more generally. In this spirit of engagement, the University through its CCE set up a continuing education programme in conjunction with the Rauawaawa Trust in Hamilton to help fulfil the learning needs of kaumātua (elders). (See Findsen, 2012, for elaboration of this arrangement). The central kaupapa (philosophy) of this holistic programme was for Māori to determine their own learning needs and organise a responsive programme to uphold *tino rangatiratanga* (self-determination). Hence, this model of co-operation was shaped by a partnership of working with older adults, in this case, of the indigenous people.

ii)   *Public education about ageing*

It is more difficult to judge the work of universities in this domain beyond the traditional pathways of non-credit continuing education. Only a small portion of the established continuing education programme has dealt with aspects of ageing in an explicit fashion. However, it is common amid partnerships with older adult-oriented agencies (e.g. Waikato District Health Board) to include curricula in credit-awarding teaching and research contracts in this arena. Universities such as Auckland and Otago, with established medical schools, have greater

potential to connect with ageing issues related to health. In most of the universities, the social science disciplines such as Psychology, Social Work and Cultural Studies, in addition to the usual credit teaching, may conduct public seminars that bring attention to age-related issues.

Another mode of dissemination of public education is for universities to link with local agencies whose remit is to provide such public education. Hence, this is a less direct function but an important one nevertheless. In the case of Hamilton city, Age Concern Hamilton provides educational events around the issues of older age, including a long-standing programme entitled "Don't wait until you're 80, matey". There is active interaction between this agency (and no doubt others) and University staff act as mentors or members of the Board. Several other social agencies have education as a subsidiary category in which older people participate alongside younger people (e.g. Literacy Waikato; the Waikato Institute for Leisure and Sport Studies). University staff support such schemes and provide indirect benefits to older participants.

Undoubtedly, the potential for public education on ageing is immense but it is currently not seen as a major pre-occupation. Public education will likely use ICT, especially social media and on-line teaching, to broaden its clientele to include not only current seniors but generational cohorts yet to feel the fuller impact of ageing.

iii) Education of (para) professionals in the field of ageing

Professional education is often provided by professional associations and is inevitably connected to policy on the need for on-going credentialing and/or continuing education in specific professions. Related to where a University is located and the particular disciplinary emphases of that institution, there will be strategic need for professional updating as in the legal profession, health workers, management, social workers, engineering, architecture and so on. As the population structure almost inevitably moves towards an *aged society* (Boston & Davey, 2006), the scope for further education, in accord with a lifelong learning agenda, will increase. Universities will be challenged to meet this on-going demand for both pre-service and in-service training, and will be encouraged to look towards a more inter-disciplinary approach to research and teach professionals in more diverse fields.

Potential for universities' engagement in older adult education

This section discusses initiatives mainly beyond Aotearoa New Zealand to observe new trends in other societies which might become applied practice in this country. What can we learn from how some universities in the global context "behave" in relation to older adult education?

i) *Active engagement of seniors in a University programme*

While there may be many programmes in universities that have actively engaged seniors themselves in their construction such as the Learning in Retirement Institutes in North America, and the diverse structures of U3A provision, the Centre for Lifelong Learning at the University of Strathclyde stands out as an exemplar of an agency encouraging seniors to develop their own curriculum with guidance from the parent institution. While the Learning in Later Life Programme established in 1987 (Mark & Hart, 2013) has features akin to U3A (informality; genuine needs assessment; active collaboration), it developed a stronger base through the older students themselves creating a student membership body and developing informal clubs based around course content. Mark, Bissland and Hart (2016:196), in reflecting on the impact of this enduring programme, point to "a focus on how older adults learn, and how teachers and learners can make use of knowledge, particularly from the neurosciences, to facilitate learning". Hence, the perceived success of this enduring programme has been directly linked to effective dialogue and social action (Freire, 1984) over two decades. Engagement of the seniors did not stop at curriculum development but more fully involved older students in manifold roles: as participants, planners, teachers and researchers in their own studies.

ii) *Inter-generational learning/education*

The area of study of inter-generational learning/education has witnessed a surge of interest internationally, especially noticeable in Europe. In a compilation of perspectives on inter-generational education, Schmidt-Hertha, Jelenc Krasovec and Formosa (2014) provide a range of perspectives and approaches. It is evident that no single definition of inter-generational education suffices (see Schmidt-Hertha, 2016); yet the concept in practice holds plenty of potential for exploration by people of all ages, especially for seniors. In discussion about forms of inter-generational learning, Schmidt-Hertha outlines the

relative emphases of different approaches: one generation with lesser knowledge learning from one another; heterogeneous groups of learners working together on a specific topic; an exchange of learning occurs when a generation learns more about the other (*ibid.*, 2016).

Universities are in a strong position to enable these different forms of inter-generational learning/education to occur. In many classrooms, there are individuals from very different generations who have vastly different experiences of social history which can be tactfully drawn upon. In the author's own direct experience, he witnessed in 2013 at National Chung Cheng University in Taiwan a classroom of young adults (more "typical" university students) and much older "students" (of 60+ age group) actively discussing how they negotiated daily life issues both historically and in current times. This inter-generational exchange of experiences and perspectives on life can be reproduced in other contexts in a similar systematic way.

iii) Age friendly universities

A fairly recent approach to considering the possible roles of universities can be found in the concept and strategic focus of the *Age Friendly University (AFU)*. Talmage, Knopf, Mark and Slowey (2016) discuss the principles by which some universities conduct their connections with older adults, especially investigating how practice and principles inter-relate. In three country locations – Ireland, the United Kingdom (Scotland) and the United States of America – these authors track what each university is attempting to achieve by making their environments more conducive to older people's needs.

The AFU concept is one consciously adopted by these three universities. While the specifics of how each institution has engaged with older people in their cities and regions can be further explored (see Talmage *et al.*, 2016), each university - the Irish University (Dublin City University), the Scottish University (Strathclyde University) and the North American university (Arizona State University) – monitored practice consistent with the developmental principles.

The three institutions engaged researchers, adult learners and external partners representing older adults' interests to develop ten principles (see Table 1) that underpin the Age Friendly University.

Table 1: *The Age Friendly University principles*

No.	Principles
1	To encourage the participation of older adults in all the core activities of the university, including educational and research programmes.
2	To promote personal and career development in the second half of life and to support those who wish to pursue 'second careers'.
3	To recognise the range of educational needs of older adults (from those who were early school-leavers through to those who wish to pursue Master's or PhD qualifications).
4	To promote intergenerational learning to facilitate the reciprocal sharing of expertise between learners of all ages.
5	To widen access to Online educational opportunities for older adults to ensure a diversity of routes to participation.
6	To ensure that the university's research agenda is informed by the needs of an ageing society and to promote public discourse on how higher education can better respond to the varied interests and needs of older adults.
7	To increase the understanding of students of the longevity dividend and the increasing complexity and richness that ageing brings to our society.
8	To enhance access for older adults to the university's range of health and wellness programmes and its arts and cultural activities.
9	To engage actively with the university's own retired community.
10	To ensure regular dialogue with organisations representing the interests of the ageing population.

Table reproduced with permission from Talmage, Knopf, Mark & Slowey (2016)

These practice principles set the challenge to connect the interests of older adults into a university's core teaching, research and engagement (civic activities). The AFU principles highlight different features of

University functions from which individual universities will need to choose those principles that are more immediately achievable but also aspire to fulfilling more ambitious proposals.

Research catalysts for older adult education: Scotland and Taiwan

Given the historical emphasis from universities on research and engagement with local, national and international communities, there have not been many universities that have concentrated on the construction and dissemination of (older) adult education research as a distinguishing feature. Two locations stand out from my personal experience as beacons of hope, one from the UK, another from Asia.

At the University of Glasgow, the setting up of the Centre for Research and Development in Adult and Lifelong Learning (CRADALL) in the early 2000s has sparked a lot of global interest in lifelong learning developments, some of which have more direct relevance to older learners. As stated in its publicity, CRADALL aims "to conduct inter-disciplinary and multi-disciplinary research and development activities in adult education and lifelong learning for social justice, social inclusion and poverty reduction" (see http://www.gla.ac.uk/research/az/gcid/partners/). Through a variety of strategies including consultancies, publications, conferences/workshops, newsletter, contributions to policy agendas, supervision of postgraduate students in adult education, European collaborations and through research fellowships, this globally-oriented research centre expands the limits of what is possible.

A current interest in learning cities/communities/regions, for instance, via the PASCAL project, enables greater discussion within localities where citizens can mobilise resources (providers and partners in learning) to better focus on the immediate and future learning needs of groups of learners, including older adults (Reghenzani, 2016). The basis of the label *learning cities* is to map what is occurring in diverse settings in a specific location, what is worth highlighting, what needs attention and to aspire to fulfil the learning needs of the most marginalised within a city. One of the main challenges from the learning city concept is to enact social inclusion in which seniors constitute a potentially large sub-population. In line with active ageing and positive ageing policies at local, national and global government levels, learning cities can stimulate debate on the benefits of learning (and for whom) and how to further enhance educational opportunities.

The second centre for greater engagement of seniors in adult education is based in Taiwan where the government, seemingly against the trend in most Western societies, is actively supporting the further development of older adult education. As a case in point, the National Chung Cheng University through its Adult and Continuing Education Department, has organised international conferences to highlight the learning needs of elders. Elaboration on how Taiwan as a country and this University have actively promoted older adult education is provided more fully by Lin and Huang (2016). In particular, these authors highlight how the opening of higher education for older adult learners can enhance university engagement with local communities via Learning Resource Centres for Active Elderly (LRCAE), backed by the Ministry of Education. Importantly, this initiative is strongly linked to Government policy, *Toward the aged society: Policies on education for older adults* (Ministry of Education, 2006). The essential message from Taiwanese developments is that older adult education is valued; government resources into staffing and innovation are much more plentiful than in most other nations and allow for considerable optimism for the future in this country.

Reflections on the scenarios

The above initiatives in which older adults are or will be actively engaged, identify potential for future development in Aotearoa New Zealand in its university sector. The first development is really an extension of a former pattern of more active connectivity between an individual university and its senior citizenry. The 3L (third age) programme at the University of Strathclyde demonstrates what is possible when the active engagement of seniors is encouraged and their involvement legitimated. Seniors who participate for a variety of motives, both expressive and instrumental, are fully capable of exercising self-directed learning (Merriam, Caffarella & Baumgartner, 2007) and capitalising on the resources of the University to better monitor their own education. To a lesser extent, a version of the Strathclyde model operated in the collaboration of the CCE at the University of Waikato with local 60+ continuing education groups until the Government (and then the University because of a lack of funding) opted out of this ACE provision. In so doing, it jeopardised the future of these fledging groups; some have survived but others have been dissolved.

The potential for more explicit inter-generational education in the strategic plans of universities is high but the reality of actual initiatives is limited.

The lesson learned from European investigations of possibilities of inter-generational education is that there needs to be clarity about its purposes.

The AFU examples and emergent principles can be related to Peterson's three main functions of educational gerontology. Some principles encourage direct engagement of older people in the planning and implementation of older adult education provision; others relate more closely to educating the public about ageing. Some other principles relate much more to (para) professional development needs. In using these principles to investigate practices in New Zealand universities, there would be a considerable shortfall in honouring such principles. What is promising about the implementation of such principles in universities is that age-friendly ventures are generally positive for all people, not only for the elders themselves.

The research orientation revealed in the work of CR&DALL at the University of Glasgow and the considerable impetus of research activity at Chung Cheng University (Taiwan) involving older people as co-constructors of knowledge point to synergies of outcomes when commitment is made at Government and university levels to promote the learning needs of older people's communities. Unlike either of these scenarios, no university in New Zealand has seen fit to provide resources to properly support the development of research and teaching on older adult learning/education. The usual site for practice, centres for continuing education, have been systematically closed down or rendered ineffective by further marginalisation. Research in the area is severely limited, with less than a handful of academics with expertise in adult learning/education, let alone more specific older adult learning/education. Given the reality of this country's increase in the older adult population in the recent decade and into the future (Boston & Davey, 2006), the logic of greater inclusion of older adult education in universities' agendas has never been stronger.

Concluding remarks

The above discussion reveals a situation ripe for further investment, providing that universities can be convinced of their responsibility to enhance the lives of seniors through education in which they undoubtedly have potential to actively contribute. The sheer weight of demographic change may bring this outcome about in a passive sense.

A change to the New Zealand Government's tertiary education priorities as a result of an increasing older population may persuade universities to take an active stance to meet more of older people's needs, including educational provision. Historically, too, there have been some admirable achievements of New Zealand universities working alongside older adult learning groups.

Each of Peterson's major foci for educational gerontology can be better met through a number of initiatives, some of which are internationally-inspired: greater collaboration between university centres/departments with local seniors' groups; the fostering of inter-generational learning activities in which universities have a stake; the adoption of an age-friendly environment on campus and on-line; the explicit attention given to research on older adult learning/education which will have benefits to multiple stakeholders. There is no shortage of imagination; there is a shortage of commitment.

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Constructing narratives in later life: Autoethnography beyond the academy

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Learning through life experiences as distinct from learning through the academy and courses have become increasingly important themes in later life adult education research and practice. Whilst the dominant discourse for most younger people is still about education and training for students in standardised and accredited courses, there is increasing concern to find ways of giving voice to empower people otherwise excluded, disempowered or missing from mainstream education, learning, research and the community. This paper specifically explores and actively mirrors ways of using techniques developed through academic autoethnography to empower older people to share and make sense of the lives they have lived by exploring some of the unexamined assumptions that govern everyday life, behaviour and decision making including in the many, often very informal contexts well beyond educational institutions, the academy and paid work. In essence, like autoethnography, our paper seeks to identify, interrogate and celebrate ways of revealing and displaying multiple layers of consciousness connecting the personal to the cultural for sharing and celebrating diversity in later life.

Keywords: *later life, autoethnography, learning, wisdom, narratives.*

Introduction

Kirkwood, Bond, May *et al.* (2010:34) suggest that there can be no more important agenda in an apparently interconnected world than to reverse the 'persistent negative stereotyping of older people by society, [who complain of being] … marginalised and 'on the scrapheap of society'. Our paper has three main, optimistic aims. First, it seeks to identify new and old ways of sharing the wisdom and resources of elders across generations. Second, it seeks to help older people validate and share their multiple identities beyond simply 'being old' and in doing so 'preserve their independence and wellbeing' (Kirkwood *et al.*, 2010). Thirdly, it seeks to identify and validate methods of sharing narratives and reverse what Muncey (2010) identifies as a lack of a shared understanding that permeates political, cultural, artistic and scientific practices and leads to unrealistic social practices and misunderstood groups of excluded people.

Our paper seeks to do five things. First, we identify some of the appealing characteristics of authoethnography as applied to learning in later life. Second, we identify areas of likeness and synergy between autoethnography, narrative research, the discourse of research and the act of telling and sharing stories in community contexts. Thirdly, we identify some of the many values of story telling and sharing in later life, emphasising the diverse community contexts where this already takes place. Fourthly, we use parts of our own experiences, for the first author as an older researcher 'beyond paid work', and for the second author as a feminist researcher, to respond personally to a prescient observation by Frank Doolan, an Aboriginal Elder from Dubbo, Australia, that Men's Sheds are 'just a bunch of blokes with stories', and that 'Here in Australia a man can get to a certain age and never get a chance to say to someone, "This is what I did". Sometimes the best you can do for a bloke is say "Pull up a chair brother and tell me where you've been". (Dubbo CMS, 2012:17). Finally, we offer some conclusions and concrete ideas as to what might be learned from autoethnographic approaches to better understand living and learning in later life within and beyond the academy.

Our analysis with its deliberately embedded, brief autoethnographic narratives is framed in the context of a growing recognition in the academic literature that 'learning through life (Schuller & Watson, 2009) as distinct from learning academically and through courses has

become an increasingly important theme in later life adult education research and practice. Whilst the dominant discourse for most younger people concerns education and training for students in standardised and accredited courses, there is increasing concern to find ways of giving voice to empower people otherwise excluded, disempowered or missing from mainstream education, learning research and the community. We seek in our paper to investigate how the theory and methods of autoethnography might be more widely recognised and valued beyond the academy in everyday later life learning practice.

Researchers in 2017 are faced with a wide range of choices about appropriate epistemologies or theories of knowledge, a choice that in turn determines appropriate methods, validity and scope, and alternative ways of distinguishing between justified belief and opinion. Research methods themselves have been and continue to be important as frameworks to develop understandings, as Law (2004:4) claimed when considering the constraints of method. Notwithstanding this, Law warned that the problem is not so much the research methods themselves, but rather the normativities that are subscribed to them in the discourses about method.

> If 'research methods' are allowed to claim methodological hegemony or (even worse) monopoly … then when we are put into relation with such methods we are being placed, however rebelliously, in a set of constraining normative blinkers. We are being told how we must see and what we must do when we investigate. (p.4)

In this paper we take up Law's warning and attempt to shed some of the constraints around the discourses that shape and constrain research methods. In doing so, we also take up Muncey's (2010:28) challenge and acknowledge the chaotic and messy nature of human experience and a pluralism of both discourse and interpretive methods. For us, autoethnography provides a way to address the constraints and helps us break through the constraining 'blinkers' that Law (2004) acknowledges in his work.

A narrative about our rationale and method

Autoethnography is defined by Spry (2001:710) as 'a self narrative that critiques the situations of self with others in social contexts'. It differs from

a 'normal autobiography' in that it sets out to subvert a dominant discourse. For us as authors of this particular paper who have expectations of a successful peer review, writing a paper in this way involves us 'going out on a limb'. Our challenge in Muncey's (2010:31) words is how to reach our audience/s in order to subvert the dominant discourse.

Unsurprisingly, autoethnographers, as Muncey (2010) notes, have tended to inhabit and sometimes relish the 'edgelands' of academia. Whilst all academic papers are written by real people, until relatively recently it has been conventional other than in some fields such as ethnography (that autoethnography in part sprang from) *not* to use the first person and otherwise 'write oneself out' of the story. This is in spite of the fact that all academics, in this case us writing for an academic adult journal and audience, deliberately choose to study and report on a particular field in a particular site or context from a particular theoretical perspective rather than another. The many normativities: effectively value judgements involved in framing research questions, methods and theoretical frameworks, and choosing which references are relevant or not to a research topic question, are seldom made explicit. Many of these decisions are based more on who we are, 'where we have been' and how we position ourselves, in this case in the field of research and practice of adult and community education. For this reason, later in our paper we deliberately 'come out' as individuals for the first time with ourselves firmly tied to the academic 'mast'.

There is less risk in using this strategy in 2017 than there was two decades ago when autoethnography was a much more marginal methodology. What has made the method more robust and relevant is the increasingly widespread use and understanding of poststructuralism, which acknowledges the critically important role of *context* and the role it plays aside from the narrative *text* itself. While a narrative is a version of events personally experienced by the narrator (and storytelling involves repeated telling or reading), Polkinghorne (1988) holds that the recorded narrative (that we have both used extensively in our own adult education research) is a snapshot in time. In effect the story we choose to write about changes according to the context in which it is retold. In this paper we are putting forward the argument that our stories shape our lives and create our experiences. Polkinghorne (1988) shares this view, when emphasising that individuals on a personal level have a narrative about their lives, which enables them to make decisions about

their lives and circumstances. In a cultural framework, narratives serve to give cohesion to people's lives and provide the means to more widely share beliefs and transmit values.

We argue that the sharing of life histories through everyday conversations, meetings, and social exchanges cause us to critique and learn from the situations of self with others, as in autoethnography (Spry, 2001, cited in Muncey, 2010:31). Indeed narrative enquiries explore lived experiences through rich accounts that can be complex and messy, calling into account those 'dominant narratives that do not match the experience/s of life as lived' (Bathmaker & Hartnett, 2010:4). Like Malec (2012), we hold that reflection and life review across life's many ages and stages are a natural accompaniment to being older, and are part of the essence of learning to be old. In later life, 'Life has been lived and it is natural to want to recognise it in meaning and purpose' (Malec, 2012:201) and indeed as a complete life.

While we use academic autoethnography as a referential starting point in this necessarily academic paper, our aim in the latter part of our paper is to identify the use and usefulness of narrative and story-telling well beyond the academy, particularly in learning from the experience of everyday life, and specifically from learning *through* the experience of later life. Jarvis (1992:199) notes that '[s]urprisingly, everyday life has not been widely studied'. Perhaps this is because everyday experience and knowledges are widely disregarded by the academy, particularly through the prism of scientific inquiry, and relegated to what Foucault (1980:81-84) calls 'subjugated knowledges'.

The explicit connection between autoethnography and learning in later life

Our paper specifically explores some of the 'unexamined assumptions that govern everyday life, behaviour and decision making' (Muncey, 2010:xi) in the many, often very informal contexts well beyond educational institutions, the academy and paid work. In essence, like autoethnography, our paper seeks to identify ways of revealing and displaying 'multiple layers of consciousness connecting the personal to the cultural' (Ellis & Bochner, 2006:739) for sharing and celebrating diversity in later life.

We have been drawn to pen this paper about writing about experience for two main reasons. The first is because of the way we perceive it

mirrors what tends to happen to real people when learning, and also when in later life they increasingly, actively and deliberately reflect on and try and make sense of the life they have lived before they die. The older we are the more our previous learning tends to 'connect up', allowing us access to and desire to actively and critically reflect on a rich range of narratives, experiences and skills, lifelong and lifewide, that we later argue are an integral part of the process of approaching wisdom.

The fundamental problem with learning in contemporary society is that it is more about teaching than learning, and hugely biased because of ageism in policy and funding towards formal and accredited, initial vocational training, primarily for youth and for the paid workforce. In doing so, it almost completely ignores two main challenges and opportunities in later life created by an ageing society, identified by Kirkwood *et al.* (2010:33).

> *The first is how to ensure the greatest numbers of older people maintain the best possible mental capital, and so preserve their independence and wellbeing, both for their own benefit, and also to minimize their need for support as they age. The second challenge is how to ensure that the considerable resource which older people offer (particularly through their mental capital) is recognised and valued by society, and that they have the opportunity to realise the maximum benefit from that, both for themselves and the wider society.*

With increasingly sophisticated medical diagnosis and intervention, the number of older adults in the 'fourth age' of dependence, increasingly limited by disability, reduced mobility, and increased risk of dementia, is growing rapidly in every country in the world. As Hitchcock (2016: Back cover) put it, there is a 'creeping tendency to see the elderly as a "burden" – difficult, hopeless, expensive and homogenous". The widely held government, community and media response to this perceived burden is of a social and economic 'crisis'. The terms *elder* and *wisdom* are seldom considered within this crisis discourse.

What role for wisdom in later life learning?

Wisdom in its simplest terms is the ability to use knowledge and experience to make good decisions and judgments, though this begs

a question that goes back to our earlier concern about normativities: 'How we might know or understand what is good?' Given the protective individual and community value of accumulative, lifelong learning through experience, it is unsurprising that the wisdom of elders based around the understanding of self has tended to be valued by most Indigenous societies, many religions and many writers and philosophers.

Despite deep historical roots in philosophy and religion, Bange and Meeks (2013) noted that empirical studies of wisdom in psychology and gerontology did not begin until the 1970s. Their systematic review of peer-reviewed research into wisdom was undertaken in the context of the widespread belief that wisdom increases with age, of a global trend towards increasing longevity and a growing interest in successful ageing. They identified a considerable overlap of commonly cited subcomponents of wisdom: specifically knowledge of life, pro-social values, self-understanding, acknowledgment of uncertainty, emotional homeostasis, tolerance, openness, spirituality, and sense of humour.

There is now hard evidence that at least some of these components of wisdom improve in later life and that an ability to reflect wisely on one's life is practically as well as ontologically useful. Happe, Winner and Brownell (1998) studied normal ageing and concluded that although performance on tasks with non-mental content may decrease with age, performance on theory of mind tasks remains intact and may even improve over the later adult years.

Ardelt and Jeste (2016:Abstract) noted that old age:

> *… is characterized by many physical and social losses that adversely affect subjective well-being (SWB). Yet, past studies have shown that wisdom tends to be positively related to SWB in old age, particularly under adverse circumstances.*

They identified, on the basis of their empirical study, that greater wisdom, '… in particular the reflective wisdom dimension, was positively associated with SWB and buffered the inverse relation between the experience of adverse life events during the previous year and current well-being'. Importantly, they concluded that wisdom 'appears to strengthen older adults' ability to cope with aging-related losses and, therefore, is a valuable psychological resource in old age' (Ardelt & Jeste, 2016:Abstract).

This evidence supports our arguments that there must be other ways of framing and responding to ageing other than invoking crisis. In particular, we suggest likely benefits of acknowledging and sharing the potential value of eldership and wisdom that responds to Kirkwood *et al.*'s previously identified opportunities by encouraging older people to share and tell their stories. Simone de Beauvoir in the *Coming of age* (de Beauvoir, 1970) examined the many myths and realities of life as an older person in the developed world, and presented evidence that despite societies' expectations, the elderly still feel the same passions as their younger counterparts. De Beauvoir (1970) critically asked, 'What should society be?' responding that the way old age is currently framed '… exposes the failure of our entire civilization. … It is the whole system that is at issue and our claim cannot be otherwise than radical – change life itself' (de Beauvoir, 1970, cited in Hitchcock, 2016:131).

There is a perception that academia, including via postmodern theory, has only recently discovered radically new and wiser ways of subverting dominant paradigms and master narratives in order to see the world afresh. Our take on *The Getting of Wisdom* theme that this journal volume seeks more broadly to investigate, is that radical change might sometimes involve going back to past wisdom about learning, not only of and through older people, but to some wise and profound pedagogies and philosophies. As the examples in the paragraph that follows illustrate, some but not all of these wise sayings are Indigenous.

There is a copy of an ancient Chinese calligraphy next to my (Barry Golding's) desk as I write this that says "No end to learning". There is a Maori saying in *Te Reo Maori* (from Aotearoa / New Zealand) that *Ma te ora ka mohio* ('Through life there is learning'). Another Maori saying overtly acknowledges the value of *Ko Ngä Täonga Tuku Iho* ('The transmission of knowledge through generations'). Barry Golding was recently in South Korea, a Confucian society with a traditional (though changing) notion of filial piety, that regards respect for one's parents, elders, and ancestors as virtuous. He was respectfully asked to propose a toast at a conference dinner because he was identified and valued as the oldest person in the room. There is an ancient Chinese proverb that 'Learning which does not advance each day will daily decrease'.

Importantly each of these examples is found well beyond the academy. They also precede and reinforce the relatively recent academic discovery

that lifelong learning matters and has value at any age cross-culturally. The examples also suggest that there is a case and value in being more overtly and universally respectful of the accumulated wisdom of older people.

'Coming out' as researchers

In this section we draw respectively on parts of our own experiences, as an older male researcher beyond full time work (Barry Golding) and a female, feminist researcher (Annette Foley) to 'come out' and talk about 'where we have been'. But first we tease out and take up Muncey's (2011:xv) autoethnographic challenge, exemplified in practice by Dubbo Community Men's Sheds' *A shed load of stories* (Dubbo, 2012) as well as by *Tales the shed* from the Creswick Men's Shed (Creswick, 2007). In doing so we return again to a theme that we (Foley, Golding & Brown, 2008) began to tease out in 2008, and revisited in 2014 (Golding & McDonald, 2014), arguing that one of the most effective ways of reporting on what happens in some research contexts, such as in our research through community Men's Sheds organisations, is to 'let the men speak', in effect to encourage the creation of autoethnographies, with minimal researcher intervention. Muncey (2010) identifies the particular power of such autoethnographies to represent the chaotic and messy nature of human experience, and argues for the use by academics of a pluralism of discursive and interpretive methods.

The two self-published examples (Creswick, 2007; Dubbo, 2012) of collected wisdom and life experiences of 'shedders' (participants in community Men's Sheds) provide an extremely rich resource of wisdom for researchers as well as the wider community. Both are published by Men's Sheds (in rural New South Wales and Victoria respectively), by and about shedders, enabling them to openly tell their stories with disarming honesty. Unburdened by the 'dead hand' of external university research ethics, the men chose to be included, to tell all, *and* to be personally identified along with their Sheds.

For brevity, we will restrict ourselves to an illustration using few brief but powerful extracts from the Dubbo Community Men's Shed collection (Dubbo, 2012), a booklet of 128 pages, with deep and detailed life stories of twelve diverse shedders. The cover notes introduce the context.

> *Told in their own words, and in a spirit of Aboriginal reconciliation, these personal journeys are raw, honest,*

> *courageous and often funny, proving the old adage that in every*
> *life there is a good story to tell.*

One Dubbo shedder, also an Aboriginal elder and poet, 'Riverbank', Frank Doolan, accurately observes on the back cover that '"Hey brother, tell me a story", might just be the most life changing thing you can say to a person'. In his own narrative, Frank tells in an understated way about how the young 'local fellas' in Dubbo had tried to push the caravan (that is his home on the riverbank) into the river, smashing all the windows, acutely observing, "It takes a big tough bloke to do that, I guess". In the next breath, Frank generously advocates for Aboriginal reconciliation, having designed the Dubbo Men's Shed's logo of a black and white handshake under a shed roof. The depth and power of these narratives and the embedded wisdom can never be reduced to a statistical correlation between independent and dependent variables.

If we are to be serious in our intent we should both as academics, similarly be able to 'hold up a mirror' to ourselves and briefly say who we are and 'where we have been'. The 'straightjacket' imposed by academic paper conventions typically constrains the use of academic narratives from personal experience. It also requires us, consistent with the standard university ethics approval process, to effectively write and 'trample over', plagiarise and anonymise the stories and data that informants have generously shared in research interviews.

Barry Golding's story

I regard myself as a very accidental, now mostly retired professor. My government *Seniors Card*, I became eligible for in Australia two years ago at age 65, overtly acknowledges me 'as a valued member of the community' and almost patronisingly implores members of the community to ' … extend every courtesy and assistance'. I was born into an Australian rural landscape and white community whose hundreds of distinct Indigenous Nations and peoples were recently violated and deliberately removed and mostly forgotten. I unhappily endured two years in an elite urban boarding school that had shades of privileged brutality illustrated by the iconic *A Clockwork Orange* film (Kubrick, 1972). These experiences set me on a course to remember, radically return to, study and defend the 'underdog', particularly grassroots communities similar to where I came from and now live in rural Australia, and as a public intellectual, to assist in unmasking the

collective national myth about Australia as a white 'Australia fair'.

My later life passions are to actively redefine myself as an older man beyond paid work, through researching, writing, riding my bicycle and gardening. Each of these I do in an attempt to keep me whole, connected, well and sane in later life. I greatly enjoy learning on my own terms and creating new things as a self-declared activist in community settings. I loathe and fear the increasing formality of school and the marketization of learning in all its forms. Much of my theoretical work in the past two decades (Golding, 2016) has been leveraging off the academy to reach back into the community based around to personally instrumental landmark texts and radical discourses from the 1970s. I have enjoyed grazing beyond the prevailing educational deficit models of the 1990s, through the poverty of education 'market models' since the turn of the century, and more recently into the exciting world of community learning, and most recently into the liberating, larrikin conviviality of community Men's Sheds that tap into my own demographic: older men beyond paid work, finding somewhere to go, something to do and someone to talk with.

I passionately believe in *Learning through life* (Schuller & Watson, 2009). Golding (2014) is a recent example of me returning reflexively to the radical pedagogies of Freire (1970) and the conviviality of Illich (1971). My learning has truly been from the ground up. I discovered people through having children, by far the most radical thing I have done in my life. Cooper *et al.*'s (2010) *Mental capital and wellbeing* and Muncey's (2010) *Creating autoethnographies* are the most impactful texts I have read and cited in the past decade.

Annette Foley's Story

Like Barry I often reflect on how I accidently ended up an Associate Professor in a University in country Victoria. I am not satisfied, however to be defined only as an academic, or as an educator. These are component parts of what defines me but it is not the total story. Part of me wonders how on earth I ended up in the academic role. But if I take the time to dig deeper and reflect on the connections between my past life and the present I can see the links that have brought me to my current life.

I have always been a person interested in social justice matters and gender politics. In my earlier days issues of women's rights would stir my

political passions, as I would try to make a difference to women's lives by volunteering to assist in women's refuges in inner Melbourne or teach women in adult education settings in order to assist them through the power of education. Over the last decade my gender politics have also included interest in equity and access and the tendency for deficit discourses to label some men, women and some youth as disengaged and disadvantaged. This *stuff* deeply concerns me. Rather, for a range of good reasons, including economic rationality, I sense that they have been unable to gather enough capabilities to enable personal agency. I am very influenced by Nussbaum's and Sen's work (for example Nussbaum, 2000; 2003) on capabilities and social justice, and believe that all people irrespective of class, age or gender have the fundamental right to develop the capabilities to live, learn and flourish through developing enough resources for personal agency.

I said I wasn't satisfied to be defined as an academic or educator only; I am a mother, wife, three months ago became a grandmother for the first time and am a lover of the music of Miles Davis and other jazz greats and the poetry of Leonard Cohen. Like the older men whose stories are alluded to in this paper and in our joint research, I am an evolving combination of my lives lived and the total of that.

Our story

Whilst we both have separate, multiple, current and previous identities as parents, partners and workers, we also retain and bring to our academic writing and narratives, values, experiences and important other vestiges, including from childhood, schooling, adolescence, coupling and separating, living in relative poverty and being unemployed, and in Golding's case, recently retiring.

It is possible to accuse us of being self-indulgent in talking about ourselves in this way. Mykhalovskiy (1996:147) provides what Muncey (2010) characterises as an excellent response to such an accusation:

> [F]ar from being a solitary process, writing only for those who produce it, an autoethnography is a social process engaging with a readership. 'a dialogic and collaborative process' with an author prepared to engage with the critical reviewer and the wider social process. The real test of self-indulgence must be: do you, the reader find anything of value in what has been written? (Muncey, 2010:93)

Like Schuller and Watson (2009:23), we both celebrate the ability of very informal settings to help people with little record of success to learn to transform their lives and communities. While we pragmatically inhabit the sometimes-stultifying formality of self-anointed 'higher education', our hearts lie well towards 'lower education' at the bottom of and beyond the hierarchy, within what Foucault (1980:81-84) described as 'subjugated knowledges'. These 'non-serious', 'bottom of the garden' ways of knowing and being such as through Men's Sheds, are conventionally rendered ineligible by the academy because they are neither 'programs' nor professionalised. These rich learning ecosystems are thankfully without customers, clients, students or patients that might make them amenable to simple academic analysis and government manipulation. They are mostly outside of texts and beyond particular disciplines, and their impact is considered invalid unless disciplinary peers, using formally sanctioned methods and theoretical frameworks, have reviewed the relevant research.

Our desire instead is for multiple, situated knowledges, accounting for context and complexity through the stories and accumulated wisdom of human being. This, to us is more important than master narratives in texts, and leads us (and many others) towards autoethnography. We concur with Polkinghorne (1998) that narratives, including our own in this section of the paper, *are* people's identities. In the context of learning in later life, we suggest that the stories people tell shape and construct the narrator's personality and reality as the story is reconstructed throughout the individual's life, and reflected on in the exceptionally important process of making sense of a life lived and inevitably preparing to die.

We both acknowledge (and at times use) the theoretical power of poststructuralism but eschew the practical *cul de sac* and powerlessness the method can encourage if used as the *only* method. We agree with Muncey (2010:49) that 'the research question should direct the method. … . No single method fits all and autoethnography is no exception'. Like Spry (2001), we gravitate as researchers towards autoethnography, narrative and story-telling to subvert and go beyond the master narratives of just one dominant discourse, including poststructuralism.

Autoethnography and wisdom beyond the academy

In the big picture, the reluctance within the positivist and scientific parts of the academy to embrace story telling as a way of making sense of life stands in stark contrast to its widespread everyday use and value for most people, communities and societies, lifelong and lifewide. The Men's Shed autoethnographies from Dubbo (2012) and Creswick (2007) are but two of a multitude of examples of older people in the community spontaneously, individually or together, retelling their own stories. It also happens through all forms of media: books, articles in newspapers and magazines, poems, films, photographs, music, songs, art, plays and poetry. We acknowledge the power and wisdom embedded within some songs: Leonard Cohen and Bob Dylan songs about later life as excellent are recent examples in popular culture. Like Chase (2005:656, cited in Muncey, 2010:133), we '... see songwriting as a form of narrative inquiry', where 'narrative is retrospective meaning making – the shaping or ordering of past experience'.

Having a conversation (yarn/chat/craic) in the street, on a train, over the neighbour's fence, by phone, Skype, Facebook, in the street or over a meal all involve a mutual exchange of ideas, hopes, joys, frustrations, loves and experiences. Within the workplace we routinely schedule and formally record the story of what happens in our meetings and who said what.

Even as researchers in this paper, as well as in our academic presentations, reports, journal articles and books, we regularly tell our stories about 'where we have been' and what wisdom we have gleaned, albeit in a formally structured way and within clearly understood academic rules about evidence, citation, sources and limitations. While we often hide and write in the third person, we do identify our affiliations and bona fides, and always write on the 'shoulders' by referencing other, wiser 'giants' of our respective disciplines.

Conclusions and implications

We have identified both new and old ways of sharing the wisdom and resources of elders across generations. We identify autoethnography beyond the academy as one way to help some older people make sense of their diverse and individual lives and preserve their independence and wellbeing. We call for a reversal of a lack of shared understanding that

permeates political, cultural, artistic and scientific practices and leads us into unrealistic social practices and misunderstood groups of excluded people generally, in the case of this paper, to people increasingly excluded in later life.

Finally, we suggest it would be wise to listen and reflect on the World Health Organisation (2001) conclusion that the greatest health risk to productivity and life satisfaction, including in later life, will be depression, and that its cause is broadly associated with the loss of close and continuing social relations in the context of industrialisation and colonisation (Laslett, 1990). Our fundamental argument is that telling our stories and hearing other people's stories and about 'where they have been' is actually good for all of us.

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Intergenerational exchange of knowledge, skills, values and practices between self-organized active citizens in Maribor, Slovenia

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Our paper deals with intergenerational informal learning developed by participatory democracy process in the Self-organized District Communities (SDC) in Maribor, the second largest city in Slovenia. It is based on the assumption that SDC assemblies, being safe and trustworthy, are very powerful spaces for behavioural and values exchange between generations and also for social and political engagement, having a capacity for critical, informed and caring citizenry of all ages (Pinnington & Schugurensky, 2009). Our case study is focused on the social dimensions of acquisition of skills, knowledge, attitudes and practices, as identified by Schugurensky (2006; 2013), and on features of social learning (Serrat et al., 2016). In an embedded single-case study design with multiple units (Yin, 2012) we conducted 12 interviews and a focus group. Among interviewees, six were retired, four were employed, one was a student and one was unemployed; they were members of first, second and the third generations. Results show that besides knowledge, skills and practices gained through intergenerational political and social actions in SDC assemblies, value and attitudinal changes (also regarding

age) are among the most important outcomes of the democratic participatory process.

Keywords: *informal learning, social learning, participatory democracy, intergenerationality, citizenship.*

Introduction

This article deals with the process of informal learning through participatory democratic practices in Self-organized District Communities (hereafter, SDC) in Maribor, the second largest city in Slovenia (with 100,000 inhabitants). Activities in the SDC have the characteristics of collaborative public actions established to focus on real-world problems as well as on social and political issues, such as the decline in prosperity, widespread mistrust of politicians, environmental degradation and community development (Gregorčič & Jelenc Krašovec, 2016), and to contribute to social change. To understand the process of self-organization of citizens in Maribor, a short explanation of the context is needed. Maribor is one of the Slovenian "left-behind" industrial cities where the economic and social situation worsened with the global and local financial crises. It was hit hard in 2008, which led to huge protests, riots and marches four years later. Almost 15 per cent of its citizens took to the streets, demanding the resignation of the corrupt mayor and the city council in November 2012. These protests inspired solidarity protests all over Slovenia and led to the resignation of the mayor of Maribor on 6 December 2012 and the prime minister of the National Government on 20 March 2013. Every evening at the end of 2012, 200 to 300 activists gathered in Maribor to discuss the situation; due to disagreement about priorities and goals, they established the City-wide Assembly Initiative (CAI). The CAI led demonstrations, occupations and sits-in in the municipality and made the 'content' of the protests visible by articulating it and imposed some form of co-governance, participatory democracy experiment and participatory budgeting (PB). The CAI was also the initiator of regular meetings of SDC assemblies.

In this article, we examine informal learning acquired through political participation, focusing in particular on the social dimensions of the acquisition of knowledge, attitudes, skills, and practices (KASP), as

identified by Schugurensky (2006; 2013), and on the intergenerational dimensions of social learning, as defined by Serrat, Petriwskyj, Villar and Warburton (2016). Despite the fact that activist groups are largely age segregated, the SDC assemblies were comprised of citizens of heterogeneous age groups living in a particular town district, and this situation made our research feasible.

Our research attempts to answer the following questions: What are the perceptions of different age groups, particularly older people, regarding selected social dimensions of knowledge, attitudes, skills and practices (KASP) acquired through participatory democratic processes? How do members of self-organized assemblies perceive the intergenerational character of their collaborative public actions in assemblies? What are interviewees' perceptions of intergenerational learning through civic participation in self-organized assemblies?

This article is divided into four sections. The first presents the social aspects of informal intergenerational learning through the participatory democratic process. The second explains the methodology used in the research. The third section presents the research results, and the final section concludes with a discussion and implications.

Informal intergenerational community learning through participatory processes

Since community can be defined as an arena for the activities of diverse people from different generations, various authors (Kump & Jelenc Krašovec, 2014; Longo, 2007; Tett, 2006; Thompson, 2002) have stressed citizens' active participation in community as a means for achieving common good, community renewal, intergenerational solidarity, social equity and/or social change/transformation. These activities implicitly contain intergenerational community learning along with social and collaborative learning for the empowerment of members, for mutually beneficial development and a higher quality of life of all generations. Since intergenerational learning is 'a learning partnership based on reciprocity and mutuality involving people of different ages where the generations work together to gain skills, values and knowledge' (ENIL, 2012:15), it is likely to lead to mutually beneficial learning outcomes, to achieve purposeful and progressive learning.

We have assumed that participation in a deliberative democratic process has the characteristic of intergenerational community learning. Namely, participatory democracy refers to the autonomous, local involvement of people in decisions that affect their lives (Held, 2006), to a 'living democracy' experiment (Fung & Wright, 2003) and to a system of co-governance. In a healthy community, all residents regardless of income, age, gender and culture should find a prosperous and healthy living space (Merriam & Kee, 2014), to which participatory democracy groups aspire. In participatory democracy, 'citizens must participate directly in political decisions' (Santos, 2005:307). 'It is, therefore, a system of co-governance in which civil society, far from being a haven of survival before an absent or hostile state, is rather a regular and well-organized way of exerting public control over the state by means of institutionalized forms of cooperation and conflict' (Santos, 2005:308).

As a very dynamic social and political process, most research on participatory democracy explores its political and democratic virtues (Santos, 2005:357), but not its learning virtues. As indicated elsewhere (Gregorčič & Jelenc Krašovec, 2016), the learning dimensions of a participatory process in local (co-)governance initiatives, particularly in self-organized community assemblies, have not been well-studied. To our knowledge, there are no findings on the intergenerational character of learning through participatory processes. As people of all ages invest a significant amount of time, effort and knowledge in these activities, we have expanded our focus on the importance of researching the 'learning dimensions of community engagement' (Mündel & Schugurensky, 2008:51) to also include intergenerationality and intergenerational dimensions of informal learning.

Schugurensky (2000) conceptualises informal learning as a residual category for learning activities, including self-directed learning, incidental learning and socialization. Informal learning can be self-directed (intentional and conscious), incidental (unintentional but conscious) or happen through socialization as a change of values, attitudes, and dispositions (mostly unintentional and unconscious) (Mündel & Schugurensky, 2008:50). Informal learning most often results in tacit knowledge, especially when it is unintentional and unconscious (Schugurensky, 2006). Serrat *et al.* (2016) who based their research on the findings of Schugurensky and colleagues, through their own research on democratic participation in political organizations,

identified three overarching categories of informal learning: social learning, political learning and instrumental learning. Within social learning they identified five themes (*ibid*:176): the 'ability to listen to and respect others' opinions'; 'a sense of solidarity with and awareness of others'; a 'recognition of the importance of social harmony'; the 'appreciation for the companionship of others' and 'integration into the community'. Through these themes the value of community and the relationship among members were clearly heightened.

In this article, we analyse our research data through the lens of social learning, as defined by Serrat *et al.* (2016). All categories were considered from the perspective of different age groups, where younger, middle and older generations were involved; we attempted to evaluate the outcomes of informal learning through intergenerational participatory democratic process, as perceived by different generations. As the researchers, we considered that members of self-organized assemblies gather regularly with the purpose to improve the circumstances of their lives. It is very difficult to presume possible outcomes of informal intergenerational learning among self-organized assembly members because mutual learning of citizens is mostly unintentional (conscious or unconscious) and the results are hardly ever verbalized.

A short preview of research conducted on the effects of intergenerational educational programmes (for example Kaplan, 2002; Goff, 2004; MacCallum *et al.*, 2006; Tam, 2014) shows various positive outcomes of such mutual cooperation and learning for different age groups. Younger participants:

- gained various knowledge and skills (including social skills), experienced emotional growth, learned about team work and better understood the lessons of the past;

- reported a greater sense of self worth and self respect, while feelings of loneliness and isolation decreased;

- reported increased feelings of social responsibility and optimism;

- developed empathy, creativity, initiative and openness.

The older generation was also positively influenced by intergenerational learning and co-operation. Older participants (defined as 60+ years):

- reported better health, increased levels of activity (also cognitive), using new technologies;

- made friends with younger individuals and developed different perspectives of themselves;

- increased mobility and capacity to solve problems;

- reported increased feelings of self-worth, reduced symptoms of depression, were less lonely, and felt more a part of the community;

- passed on tradition and culture, developed social skills and improved life circumstances.

We assume that participation in self-organized assemblies might be associated with many of the outcomes mentioned above, both for younger as well as for older generations. At the same time, through participation in self-organized groups, members of different age groups can influence community development and change, which is one of the important goals of community learning and cooperation. We also presume that intergenerational exchange occurring through participatory democratic processes encourages citizens of all ages to jointly solve problems in the community, strengthen and revive contact with neighbours, facilitate social cohesion and establish a more inclusive society through the development of social networks and community ties. We argue that the participatory democratic process in the SDC assemblies is accompanied by informal learning, which has the characteristics of mutual, reciprocal learning between participants of different generations, with benefits for both older and younger members of these groups.

Design and methods

Sample

Research was conducted in eight districts in urban communities in Maribor in 2015 and 2016. We investigated two interrelated groups of active citizens: the initiators of a participatory democracy and PB process in Maribor, the so-called 'moderators' working under a City-wide Assembly Initiative (CAI) and assembly members at the SDC. However, the CAI mostly consisted of young people, both men and women, aged between 23 and 40 years, who were predominantly students, working class activists and Non-Governmental Organisation members with extensive experience in direct democracy practices; the group consisted of around 30 activists. In contrast, SDC assembly

members were mostly retirees, aged between 55 and 83 years; men from middle and working class origins, who had fully experienced the socialist period, prevailed. A small number of people under 30 years also attended assembly meetings, but the age group between 30 and 50 years was underrepresented. The SDC consisted of 10-80 assembly members, depending on the problems and open issues in each community. The characteristics of our interviewees are summarized in Table 1.

Table 1: *Characteristics of 12 interviewees*

'Generation'	Gender	Age	Member of	Status	Highest levels of education
1. gen	Female	25	CAI & SDC	student of history	high school
1. gen	Female	30	CAI & SDC	employed; cultural anthropologist and ethnologist	university degree
2. gen	Male	37	CAI & SDC	employed; constructive technician	high school
2. gen	Male	39	CAI & SDC	unemployed; precarious worker in journalism, culture & art	high school
2. gen	Female	55	SDC	self-employed; philologist; professional international humanitarian work	university degree
2. gen	Male	62	SDC	self-employed; lawyer	university degree
3. gen	Male	66	SDC	retired, lawyer	higher education
3. gen	Female	68	CAI & SDC	retired, worked as economist	higher education
3. gen	Female	68	SDC	retired, worked in hospital	high school
3. gen	Male	73	CAI & SDC	retired, worked as economist	higher education
3. gen	Male	77	SDC	retired; worked as technician, ecologist	high school
3. gen	Female	83	SDC	retired; worked as financier	high school

As presented in Table 1, there were two interviewees from the first generation, four from the second (middle) generation and six from the third generation (65+). The youngest interviewee was 25 years old and the oldest was 83. There was one student, two employed persons, two self-employed, one unemployed and six retirees. None of the interviewees had an educational level lower than high school, which for older people in our research means they had above-average level of education (compared to average educational levels of older people in Slovenia).

Instruments and procedure

We used a triangulation of qualitative research methods (Creswell & Plano Clark, 2011). In an embedded single-case study design with multiple units (Yin, 2012), we researched how and why learning occurred in a particular real-world context, through a participatory process in the SDC assemblies and the CAI meetings. Twelve interviews that lasted between 90 and 120 minutes were supplemented with a focus group that was conducted during an SDC assembly with 12 participants in Nova vas on January 7, 2016, in the community centre where regular SDC assembly meetings had taken place for the last three years.

Besides the questions about the participants' prior history of civic engagement and civic learning, and strengths and weaknesses of the interviewees' engagement in a participatory process, interviewees were ask to list what they gained throughout the process, according to Schugurensky's KASP categories of learning (Schugurensky 2006; 2013). Each indicator was rated on a 5-point Likert scale. For positive changes they could choose 4 (better) or 5 (much better); for negative changes they could choose 2 (worse) or 1 (much worse); number 3 marked the KASP position before they engaged in participatory democratic practices. Further, interviewees were asked to rate 70 indicators of learning and change (in the area of knowledge, attitudes, skills and practice) on the same 5-point Likert scale. The indicators were based on Schugurensky's previous research findings (*ibid.*) and adjusted according to the specific municipality and local/national context. Each interview was concluded with three open questions on community learning and related quality of life.

The interviews were carried out by common consent and in the confidence of the involved persons; their right to privacy and anonymity

was respected. All interviews were transcribed and subjected to content analyses. A coding process was conducted, the concepts were categorized and the analysed material was interpreted.

Results

Regarding the above-mentioned five themes of social learning through democratic participation, introduced by Serrat et al. (2016: 176), 18 indicators (among the 70 researched in our case study) were identified. From all 18 relevant indicators of social learning, only those dealing particularly with the intergenerational dimension of learning in participatory practice are selected and analysed in this article; indicators are presented in Table 2.

Table 2: *Selected indicators regarding the intergenerational dimension of learning in participatory democratic practice*

Rank among 70 indicators	KASP Area	Indicators of Learning & Change	Ave. increase	Social learning categories (Serrat *et al.*, 2016)
4.	Knowledge	knowledge of constructive discussion necessary for consensus reaching	1.50	recognition of the importance of social harmony
6.	Skills	ability to make collective decisions	1.50	recognition of the importance of social harmony
7.	Skills	ability to engage in teamwork and cooperation	1.50	recognition of the importance of social harmony
11.	Skills	ability to achieve consensus	1.42	recognition of the importance of social harmony
15.	Skills	ability to resolve conflicts	1.36	recognition of the importance of social harmony
18.	Skills	ability to intergenerational exchange	1.25	integration into the community
23.	Practice	strengthen intergenerational cooperation	1.25	integration into the community

| 31. | Skills | ability to relate to neighbours (social skills) | 1.00 | integration into the community |
| 33. | Attitude | concern for the problems of the neighbourhood | 1.00 | integration into the community |

The average increase for all of the above presented indicators is one or higher than one, which suggests that the interviewees recognized the importance of the change in their intergenerational learning. The 'recognition of the importance of social harmony' (Serrat *et al.*, 2016) is represented in our table with five indicators: the first, 'knowledge of constructive discussion necessary for consensus reaching', ranked high (4) among all indicators with an average increase of 1.50; the other four indicators are skills and include the 'ability to make collective decisions', 'ability to engage in teamwork and cooperation', 'ability to achieve consensus' and 'ability to resolve conflicts', ranked 6, 7, 11 and 15, with an average increase of 1.50, 1.50, 1.42 and 1.36, respectively. 'Integration into the community' (Serrat *et al.*, 2016) includes four indicators with an intergenerational dimension: the first is the skill 'ability to intergenerational exchange', which is ranked 18, and the second is a practice 'strengthen intergenerational cooperation', which is ranked 23, both with an average increase of 1.25; the other two are the social skill 'ability to relate to neighbours', which is ranked 31 and an attitude 'concern for the problems of the neighbourhood', which is ranked 33, both with average increase of 1.00 as a result of participation in the CAI or the SDC.

From the ranking we can reasonably infer that in the opinion of the interviewees, intergenerational cooperation is less important than we might expect. However, further analyses of the interviews, which are presented below, show that there are several reasons for such a ranking result. On one hand, younger people were, before entering the participatory democratic process, basically focused on political topics and were not 'aware' of intergenerational cooperation occurring 'through the participatory process'. However, after being asked about it, they were often surprised about the intensity and importance of the intergenerational dimension of their cooperation and learning. It became clear that to a certain extent intergenerationality was a self-evident,

unconscious and internalised aspect of cooperation in a participatory process. On the other hand, older generations were more aware of the importance of cooperation than younger generations; they entered the process of participatory democracy with the intention of helping younger generations understand the necessity of interconnectedness. In the interviews it was stressed that intergenerational cooperation and learning is a very important and valuable aspect of mutual learning in the self-organized groups in Maribor.

The meaning of the CAI and the SDC in changed social circumstances

Interviewees from all three generations agreed that the CAI and the SDC assemblies brought important social and personal changes to their lives but they also saw their role in the SDC as meaningful for further social change regarding intergenerational solidarity and help. Older people stressed the strained social situation in which young people find themselves now. For many older people and middle-aged adults, participation in the CAI or the SDC is a fight for future generations. An older member of the focus group explained:

> *At the moment nothing is good. We, the old … we are the generation which is quite safe even though we have low pensions; we can babble, nobody can harm us. I'm here because of the grandchildren, and most of us probably, too […] those children will be slaves if this continues. This is all about our children and grandchildren, not us, our generation. In this sense we all fight … we are here to push together in right direction. (Focus group)*

Older interviewees, who themselves grew up and lived in the socialist system, blamed the transition to neoliberal capitalism as a reason for the change in values and the destruction of the spirit of community and solidarity, the basis for the previous system. They stressed the change in values through the transition as the most devastating for the future of younger generations.

Most interviewees (regardless of age) stated that the intergenerational character of the CAI and the SDC groups was one of their important positive characteristics; what counted was their wish to participate in a democratic group of equal members:

> *It is an intergenerational group, absolutely ... I could say there*
> *are the youngest, the middle and we, the oldest. This has some*
> *advantages. (woman, 83, SDC, 3. gen.)*

However, among the younger generation of interviewees, awareness of the need to strengthen solidarity and connectedness was also strong; it seems that in contemporary society, young people are those who are losing the most. They don't know the previous values system, but they know that what they are experiencing is not good. If the older generations are striving for lost solidarity, the younger generations are discovering something they had never had or done before. Informal learning is deeply embedded in this process; it's an indispensable companion of the process of searching for meaning in life and in relations with others.

Intergenerational cooperation and learning in the CAI and the SDC

Intergenerational networking and collaboration are rooted in the community. Communities are the best places to practice it, and self-organized groups can be thought of as miniaturized communities. Its importance is confirmed by some of the statements of our older interviewees:

> *I have intergenerational contacts upwards and downwards;*
> *with my older friend, who is also a member of SDC, and with*
> *moderators, girls, who sacrifice their time for us, for the group.*
> *(man, 66, SDC, 3. gen.)*

> *Urban districts are unique points where generations meet.*
> *(woman, 83, SDC, 3. gen.)*

When asked why they decided to join the CAI or the SDC, most of older interviewees stated that they wanted to stay active, to work with younger people, to solve problems together, one for another. According to Frye Burnham and Perlstein (2002), informal intergenerational learning includes an entire array of ways of reciprocal learning, in which different generations cooperate to establish intergenerational ties with the hope that one or both groups benefit. This kind of intergenerational perspective was also very strongly emphasised among our older interviewees as a reason for joining these groups:

> *What is important for me is socializing with younger people,*
> *but this is not nostalgia for youth; it helps me understand young*

people, their new ideas, their view of life, which is different from
mine. This influence is extremely positive and I hope my influence
on them is equally positive. (man, 73, CAI & SDC, 3. gen.)

As mentioned, younger people are the majority in the CAI; at the time
of the research, there were only two older moderators active in the
CAI (both were involved in our research). The youngest interviewee
discussed the meaning of intergenerational ties as such:

Intergenerational cooperation in CAI – well, we didn't have
much choice, the group is as it is, which is perfect. We have C
in R in the group (retirees, aged 68 and 73); their stories are
absolutely crazy. They have completely different perspectives
about the world, different experiences, which our generation
don't have and will never have. They take care of us (laughing
…). C is such a mother! In the assembly meetings and in private
conversations, intergenerationality is always there. (woman, 25,
CAI & SDC, 1. gen.)

Intergenerational community learning

As other authors (Foley, 2001; Mündel & Schugurensky, 2008;
Schugurensky, 2006) discovered, it is difficult to verbalise the learning that
occurs through participatory processes. However, when asked about the
meaning of learning, and also about the manifestation of intergenerational
learning, many interviewees verbalised its effects and the process itself:

I have a lot of knowledge which I pass on; others have other
kinds of knowledge, which we share. (man, 62, SDC, 2. gen.)

This is a mass social movement in formation, and consequently,
learning is crucial. That way people internalize those actions,
become empowered … (man, 39, CAI & SDC, 2. gen.)

You are not alone and you learn something at each assembly
meeting. The possibility for such learning is important for
me. Your contribution echoes in people's actions, and this is
delightful. (woman, 30, CAI & SDC, 1. gen.)

Interviewees and members of the focus group also evaluated the role of
community learning for the process of participative democracy. As the

initiators of participatory democratic processes, younger interviewees developed a clearer vision of the meaning of learning as older interviewees:

> *Mutual learning, absolutely. Each assembly, each meeting is also learning. It connects the group, connects people who didn't know each other before. And at the same time it's personally beneficial. (woman, 25, CAI & SDC, 1. gen.)*

> *For me, learning in the community is crucial; it's learning through the process of co-determination, which includes learning about communication, consensus building, direct actions ... When people internalize those practices, we can talk about democracy. After that people become aware of themselves as parts of personal and social relations in a certain environment, and only then do they start to achieve radical improvements and changes. (man, 39, CAI & SDC, 2. gen.)*

Also, the oldest interviewee pointed out the importance of informal learning through social participation in the community:

> *The one who participates learns a lot. This is learning, where each person who participates gains. It's really a good way of learning; it's in the environment, where you live, and you solve common problems. (woman, 83, SDC, 3. gen.)*

Discussion and implications

Within the category of social learning among older people engaging in political participation, Serrat *et al.* (2016:176) identified several factors that also proved to be important in our research, such as a deeper consideration of others' views and acceptance and tolerance of those views, a greater sense of awareness of others and the importance of helping them, and also the wish to feel more connected with others. All our interviewees stressed the importance of solidarity, social harmony and companionship, and the importance of intergenerational cooperation and learning was evident throughout their evaluation of their participation in the SDC and the CAI.

Researchers (Longo, 2007; Tett, 2006; Thompson, 2002) strongly connect community engagement for solidarity, common good, social

equity and inclusion with intergenerational learning, and these
perspectives are also clearly expressed by our interviewees. These
activities are oriented towards non-biologically linked youth and older
adults. In our research, older generations state that the needs and
prospects of younger generations are the most important motivation
for them to join the CAI and the SDC. They are convinced that SDC
assemblies are particularly important for further social change and
intergenerational solidarity, which are needed because of the insecurity
and dead-end social situation affecting younger generations. Many of
our older interviewees and members of the focus group felt they were in
a position of not having much to lose and expressed their wish to help
younger people and to fight for their rights. They regretted the erosion
of positive values and were particularly concerned about the loss of
values promoting connectedness and solidarity set in motion during the
transition from socialism to neoliberal capitalism. Younger interviewees
contemplated the meaning of the SDC and the CAI and confirmed the
feeling of personal emptiness and social loss as a result of these changes.
They emphasised that before joining self-organized groups they very
often felt desperate and excluded, and described the CAI and the SDC as
'their family', demonstrating that they appreciated the intergenerational
atmosphere and solidarity expressed by the older generations.

Wenger (1998) emphasises the importance of meaningful experiences as
a key product of learning and describes those processes as incentives for
forming 'communities of practice'; for Wenger, knowing is a matter of
active engagement in the world and being a social being is a central aspect
of learning (*ibid*.: 4). Regardless of the different roles of our interviewees
(either as moderators or members of assemblies), they greatly appreciated
being members of these groups. By entering participatory activities,
interviewees stated that they built a community where they found
meaning and friends, and grew personally and socially. All interviewees,
older and younger, stressed that they are more 'tolerant of the opinions
and attitudes of others', more confidential and more patient. They
'searched for consensus' and their 'trust in people increased'.

Various authors (for example Frye Burnham & Perlstein, 2002; Goff,
2004; Illeris, 2004) suggested that the key types of support enhanced by
intergenerational cooperation are emotional and social. This is strongly
connected particularly to intergenerational learning, which is often
considered as a 'reciprocal exchange of knowledge between people of

all ages so they can learn together, and learn from each other' (ENIL, 2012:14) in different spheres. Different types of activities also include friendly and informal social encounters; exchange of experiences, knowledge, know-how and memories; active solidarity towards those in difficulty; and a desire to 'live together' (*ibid*: 15). In their answers, our interviewees emphasised precisely those activities, such as 'exchange of experiences, opinions, connectedness, collective deliberation, ability to understand problems directly, awareness that one can contribute to equality, openness to different people', that seem to be the most important part of their gathering.

A number of our interviewees stressed the intergenerational character of the CAI and the SDC and the associated advantages. Our data showed the openness of older and younger generations to the collaborative struggle for common goals, which they saw as productive and possible. This differs from data from Flash Eurobarometer Intergenerational Solidarity (March, 2009), which showed that EU citizens were most likely to believe that young people and older people do not easily agree on what is best for society (69% agreed). We note that this is not the case in the CAI and the SDC. Although the older interviewees were worried about the low participation of younger generations in SDC, they expressed strong trust and confidence in them. Older interviewees would like to encourage younger people to participate more actively in community actions and self-organized assemblies because they believe collaborative action is the only way to achieve social change. They stressed the privilege of being exposed to different and new ideas of youngsters, which they assessed as extremely positive, while the younger interviewees were enthusiastic about the experience, knowledge and wisdom of the older members.

Although it is difficult to verbalise learning through participatory democratic processes, some of our interviewees clearly confirmed that they learned much and were aware of it; we can therefore confirm the process of tacit learning (Schugurensky, 2006). They stated that learning involved collaborative planning, sharing knowledge, internalizing the meaning of social actions, becoming empowered and therefore initiating new actions. It involved community development activities, activism and social change. Foley (2001:71-72) defines this kind of learning as social, cultural and political. Learning, as verbalized by our interviewees, is exactly this: informal, activist, authentic and primarily emancipatory because it is connected to struggles for equality

and civil rights. It is learning about engagement in community, as defined by Mündel and Schugurensky (2008).

Conclusion

In this paper we have analysed informal learning of different age groups, particularly older people, happening in non-traditional social settings, as self-organized assemblies are. Findings show that (a) being a part of social action groups offer older people an opportunity to learn about younger generations and their values; (b) for many older people, participation in community constitutes an investment into future generations and offer them a sense of solidarity; (c) even if intergenerational cooperation and exchange is not a primary goal of community engagement, these dimensions have substantially and positively changed as a result of participation in mutual deliberation and actions between different generations; (d) collaborative decision making in mixed age groups led to an increased acceptance and tolerance by older and younger members; (e) the knowledge and skills that are necessary for social solidarity, intergenerational cooperation, awareness of others and social harmony increased most notably as a result of participation in the process of self-organization of citizens enhancing engagement in civic society. The lessons learned from this case study are important for further research into older people's motives for being engaged in participatory democratic practices and consequently for research their informal learning.

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Ageing and learning experiences: The perspective of a Polish senior immigrant in Sweden

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The general aim of this paper is to present some insights into Polish senior immigrants in Sweden. In particular, it seeks to identify and illustrate the important contribution of previous generations of Polish senior immigrants in building on the diverse culture, traditions and values of the Polish community (Polonia) in Sweden. The paper considers what it means to be an older (age 65+ year) Polish immigrant in Sweden. A biographical method was used in this research to gain these insights. The research evidence was largely collected by means of narrative interviews. Life history is one of the ways to gain insights into the experiences of individuals. A narrative output is never an isolated product. There is always a close link between narrative and other social, cultural and ideological contexts. This paper emphasizes that stories and participant experiences will make more sense if there is a good understanding of the broader contexts in which the individual's story and experiences are embedded. Because of its brevity, the focus of this paper is an in-depth rendition of one older woman's learning experiences in adjusting from war-torn Poland to Sweden.

***Keywords:** migration, ageing, older adult learning, life experiences, identity.*
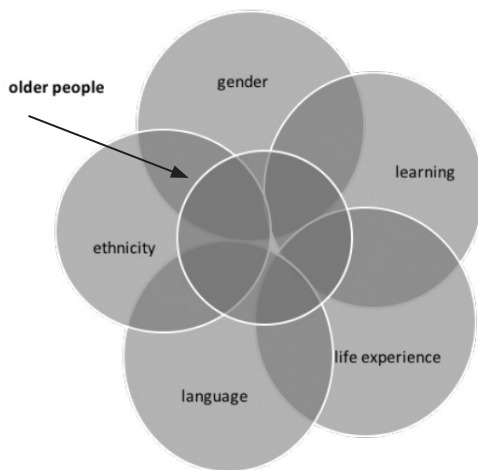
Understanding ageing and old age

Old age has both objective and subjective dimensions. According to Dubas (2016:16). Old age:

> *… is not only the obvious, tangible, verified empirically illustrated numerical indicators, but it is something difficult to express and capture, it is individualized. Old age is a biological phenomenon and socio-cultural, but also the individual human fate.*

Objectively, what old age means can be verified from publications or reports in which knowledge is typically documented by quantitative research, which commonly uses statistical or laboratory experiments. The dimensions of old age can also be expressed in common, everyday language, as, often expressed in social stereotypes about age and in general knowledge, based on the daily patterns of thought that are the result of socialization (Dubas, 2016). Whilst these pictures of old age can be enhanced via research into subjective dimensions of ageing available via knowledge derived from individual biographical experiences, the research is often accused of being intuitive in nature and not supported by 'hard' data (Dubas, 2016). The criticism is that the knowledge is derived from qualitative research that relates to the individual experiences of the person, which is or might be re/constructed according to a changing context, and thus not be subject to rigorous verification. The objective dimension of old age is seen as a kind of foundation of theory to which we can relate, with which we can discuss, argue and activate in the subjective dimension. Nevertheless, these two dimensions: objective and subjective provide the background for an analysis of old age and ageing which I present from two perspectives: the socio-cultural and biographical (Alheit, 2009; Alheit & Dausien, 2002; Bron, 2007; Bron & West, 2000; Dominicé, 2000).

Figure 1: *A socio-cultural map of ageing in the context of migration*

<div align="right">Source: M. Malec-Rawiński</div>

In my first step towards understanding ageing from a socio-cultural perspective, I constructed a socio-cultural map of ageing in the context of migration (Figure 1). The socio-cultural aspects, i.e. ethnicity, gender, learning, life experiences and language are related also to identity (Bron & Thunborg, 2011). Identity might be seen as being formed in the nexus between agency and structure, assuming an individual is the acting agent (Giddens, 1984). 'In forming and changing learning identities, people experience struggles in relation to who they are in a specific situation or context' (Bron & Thunborg, 2011:1). Therefore the specific context is aging and the specific situation is migration.

Every society has its own culture with a particular set of norms that are socially sanctioned. These norms are transferred by traditions and induce a specific style of life for every person (Giddens, 1991). In each culture, the social position of every man and woman has a different status. Thus, older women might be differently perceived in that society than older men. Old age often decreases a woman's self-esteem because she is not able to fulfill all of the required normative roles. However the masculinity of older men is also questioned (Sandberg, 2011), and like femininity has to be redefined. The next factor, which cannot be ignored, is language. Language is a tool express to ourselves and our identity, as well as to enable us to be able to be understood by others. To know

the language of country to which we migrate is a kind of 'passport', opening up the possibility of experiencing a new culture, making new friends and re/constructing identity. Surrounded by and embedded in culture, sometimes we do not realize that the way of seeing older adults is culturally and socially formed and mediated. As Bron argues (2007:207), 'Language as well as culture and its values, beliefs, speech patterns, and forms of understanding are not static phenomena. They change through interaction in different milieus, contexts, and situations, as well as at work.' The way of living and the way migrants communicate are very much connected with their life experiences including prior learning experiences. Therefore, biographical learning and life experiences are crucial for understanding these processes and also for constructing identity.

The second perspective for understanding old age and ageing is the biographical perspective. Using this perspective, I analyzed ageing from three key components: life course, identity and significant learning experience (Antikainen, Houtsonen, Huotelin & Kauppila, 1996). The significant learning experiences across the life course follow Antikainen *et al.*'s (1996) schema, in which experiences guide the story of life, which might change, re/build, re/construct or strengthen the identity of the person who tells the story. However, those changes of identity are "subordinate" to the core of identity. Moreover, the identity of the individual in the modern world is an unfinished project, in constant change, movement and re/construction (Giddens, 1991). Nevertheless personal identity is always based upon a previous mapping of life experiences (Heymans, 1992). Therefore, those key elements of identity correspond with the socio-cultural map of ageing, where learning experiences are the important elements of ageing and identity in old age from the perspective of a life course approach.

The context of migration

Migration, including for some the process of becoming a refugee, involves complex, multi-contextual processes that affect every social dimension of human existence (Castels & Miller, 2009). This suggests that the process of migration should be considered from many perspectives, not only from a sociological, economic, political, demographic, historical, psychological perspective, but also from the subjective, individual perspective. The subjective perspective of

migration is mostly connected with knowledge derived from individual biographical experiences of the migrant. The factors causing migration (political, economic, psychological or social) are sometimes clearly visible in the individual life story of each migrant, while others are irrelevant or vice versa.

The *individual* perspective is very much connected with microstructures and social contacts in the host country. Increasing social contacts create new perspectives in a migrant's life in the host country and make a return to a home country more complicated (Castels & Miller, 2009). Being and living in a host country triggers the process of re/thinking about culture, language, tradition, functioning of institutions and history in the context of a "new" place and time. Migration invariably leads to confrontation with the boundaries of our heritage (Chambers, 1994), to seek out roots, the migrant's place in the world and to discover their limits. I have used this individual, subjective perspective as the main mechanism in my reflection on migration in this research.

There are as many reasons for migration as there are migrants. There are positive and negative aspects of every migration. There are many 'faces' to each migrant's world. The world of Polish migrants to Sweden is similarly multi-faceted. One face of the migrants' world is the world of Polish senior immigrants to Sweden. The world of more recent immigrants seems to be quite different from the world of Polish immigrants who came to Sweden quite a long time ago (around 30-40 years). The heterogeneity of the migrant population of older Polish people leads to diversity in many aspects: values, needs, problems, lifestyles and learning. It thus requires researchers to look at migration and ageing as a multifaceted, multidimensional and multi-contextual process. I concur with Muszyński (2016:23), who argues that the consciousness of the narrator and his/her interpretation of life experience is an important element in researching ageing, especially in a migration context. However, it is possible to distil and understand it only from the biographical perspective.

The methodological framework

My wider research project of ageing from the perspective of Polish seniors' immigrants in Sweden (Malec, 2012; Malec-Rawiński, 2016) was designed using a biographical approach as well as through an

ethnography. In the research project, older adults, Polish seniors im/migrants, were the focal point. The main research aim was to consider what it means to be a Polish migrant in Sweden from two perspectives: time (past, present, future) and culture (Polish and Swedish). My research goal was to further develop the idea of a phenomenon of learning to be old, effectively an examination of biographical ageing or ageing biographically. A biographical approach (Alheit, 2005; Alheit, 2009; Alheit & Dausien, 2002; Bron, 2007; Bron & West, 2000; Dominicé, 2000) was used to investigate the process of ageing from a learning perspective with the intention of understanding learning as a part of life to be better recognized in later life. The research questions were: What is important for life from the biographical and ageing perspective? What is the picture of the formal, non-formal education and informal learning of the Polish senior migrants in Sweden? What does it mean to age as a migrant?

Biographical theory is closely concerned with learning. It takes into account an individual life in its totality (in all its stages and phases) as a framework for potential learning. Referring to the concept of 'unlived life' (Alheit, 1995:64), through reflection of one's own biography, individuals can ascribe/imply meanings, and create new meanings to the processes of their lives, to events and experiences of the past, to ongoing events and experiences as well as to ideas and dreams of the future. The reflective learning process can change people's perspectives and life chances and in this way learning can become transformative (Bron, 2007). Biographical theory provides an interesting explanation of biographical activity as a result of interaction between different environments, which at the same time are the product of biographical activity (Bron, 2007). I used biographical theory from a symbolic interactionism perspective (Blumer, 1969; Mead, 1934; Berger & Luckman, 1996), in order to explore the life worlds of Polish migrants.

The methodology of the project was based on in-depth narrative interviews with older adults, all Polish senior migrants now living in Sweden. It was desirable to include diverse interviewees from a range of professional, educational and gender backgrounds. The aim was to understand the biographical learning and ageing of this group of older people. The research was conducted in 2010 and 2011 as part of a scholarship from the Swedish Institute (SI). I collected data from seventeen older Polish adult migrants who came to Sweden many (30-

40 years) years ago. All were over 60 years of age and most had been in Sweden for at least 30 years. That they had lived both in the Swedish and Polish cultures was the main criteria of participant selection. To locate interviewees, I used a 'snow-ball' technique which allowed me to regard the first interviewee as an 'opener' who would introduce me to the next subject. I interviewed older adults (over 60) with diverse professional and educational backgrounds of both genders: eleven women and six men The interviewees read, commented upon and authorized their written life histories. For data analysis, a grounded theory approach was used (Glaser, 1992; 1995). Grounded theory requires a careful and discrete sequence of analysis: open coding, selective coding, discovery and naming categories (Glaser, 1992).

The process of analysis

The process of analysis took a long time, requiring many hours of reading, coding, categorizing and making maps of emergent categories. Reflecting on the autobiographical experiences I was part of during this research, the researched people became, to borrow the phrase from actress Danuta Stenka, 'signpost people', as actors who played a meaningful role in my life as significant others (Sullivan, 1947). Without meeting them, I would not be who I am now, both as a researcher, as a woman or even as a human being. The researched people, along with my grandmothers (Malec-Rawiński 2014; 2016), became 'teachers of life', and 'signposts of life' (Malec, 2012), who helped me to understand what life and ageing is and what is important about life experiences. In essence, the research process helped me to discover and learn much about the values which directed decisions in my own life.

Being a researcher obliged me to take on some of the onerous responsibilities of knowledge of collected data and the authenticity of my analysis. Klementowska[1] (2015:1) claimed that 'People are more important than the text. The text appears and then will disappear, like a book. The people will stay, and they might suffer.' Particularly important is the way in which the researcher interprets and analyses the narratives produced in the interview and the way it impacts either positively or negatively on the interviewee (Elliott, 2005:141). Therefore, the ethics of collection and analysis of data were very important to me. As Elliott (2005:142) claimed, 'It is a key ethical principle that the anonymity

and privacy of those who participate in the research process should be respected.' I agree with Egger (1995:124), that 'In all cases of working with life-stories we take the responsibility for the situations in which the stories will be told', and also for what will come after.

As Schuller (1992:19) claims, '... not all individuals pass through the same set of stages'. Nevertheless I identified many categories from the analysis of the collected data that were common to respondents.
I divided these sets of categories into two broad groups. The first group comprised a recognition of life experiences from the people researched: such as learning, the body, Second World War experiences, post-war experiences, family, experiences of migration connected with learning, family and Swedish society. Indeed there were many subcategories linked to those main categories and to one another. The second group of identified categories need to be more develop and will be present in the next paper'.

Findings

The above-mentioned categories are visible in all of the narratives. To effectively present more illustrative detail in this brief paper, I have chosen to concentrate on just one of the seventeen interviewees, the life history of 'Maria'. This case study, as with many of the narratives, provides evidence of many levels and aspects of lifelong learning. As Chambers (1994) claims, in the migrants' world the significance lies in the story that is constantly de-constructed and re-constructed in the interaction between what is inherited and what the migrant experienced in a new place. A key factor for the course of the migrants' life story is the cultural distance between the country of origin and the host country, and the decision to migrate, whether forced or voluntary (Niedźwiecki, 2010). These aspects are crucial in Maria's story. Maria migrated to Sweden after retirement as a family reunion. Her daughter had lived in Sweden for many years. Maria, in telling her life story, was constantly de-constructing and re-constructing her life experiences from the perspective of her longevity. When I first met her, she was 93 years old and a very reflective woman whose life had been outstanding.

As Maria said, *a lot of interesting things from my life touched the history (...)*. On the other hand, she claimed *my life went back (differently) to what I was prepared for*, however the *life was rich*.

During the Second World War, by the age of 24, she was a commandant, lieutenant, general and a spy as well[2]. She was very much engaged in the liberation of Poland. When the Second World War was over her life turned in unexpected ways. A new political system, communism came in. She was arrested during roundup *"łapanka"* or *"kocioł"* (in Polish)[3], went to prison and was sentenced to death. However, she defended herself. To place Maria's life experiences in the context of the multiple data categories recognized from the people I researched, I will, for brevity, restrict myself to just four categories: Second World War experiences, post-war experiences, experiences of migration and learning. In my experience as an interviewer in the wider research (Malec 2012; Malec-Rawiński, 2014; 2016), these are essential in understanding ageing and learning from a biographical perspective in a migration context.

1. Second World War experiences

Maria was brought up in the spirit of patriotism. She was a brave and strong young woman. As a servicewoman she was a right- and left-handed shooter. Being a general (officer) in the underground (Home) army, conspiracy set her up for a specific style of life (and) lack of privacy (…). As she said, (…) *life wasn't mine, I lived for the others (…),* She had to lie, *(…) all the time, and there were always lies.* However she had no choice, She had *the feeling of doing the "big thing" – important (…),* which meant that she wasn't *thinking about* herself (…). She was all the time *on the edge life and death.* As she said, *I hadn't my own life.* As a spy she was on the watch all the time. She spoke German, so sometimes she pretended she was German. on one hand, the life in conspiracy, made her identity unstable. On the other hand, the conspiracy became a natural situation. As she said, (…) *the conspiracy was embraced* (in my life) *… the natural thing was that you live normally, you live in this twisted way, you are twisted constantly* (you don't know another life). Maria lacked a private life but had dreams and plans for future.

2. Post-War experiences

The war and post-war experiences were regarded by Maria as the *"hump".* This related particularly to her unforgettable memories of her time in prison. As Maria claimed, prison was (…) *the place of internal*

meetings (...). *I was lying all the time during interrogation* When she defended herself she even surprised herself. As she said, (...) *during the life course such things come, that you don't know yourself, you don't know how you will react to certain things ... immediately you know, I sobered up and I became completely different, I defended myself* (...). She was sentenced to years in prison. Thanks to a National Amnesty after three years she was released from prison. She became very close to the women she was with – they developed a kind of "prison community". After coming out of prison, she and her family were persecuted. *There was such a huge chaos after leaving the prison ... it was completely unknown what happened. You do not know whether you came back to childhood or returned to pre-war or postwar times. ... Nothing was ... you did not attempt for anything ... such a confusion in the head and in life ... difficult to describe ... you do not know who you are (...)*. She faced difficulties finding a job for many months. She had no money and no future perspectives. (...) *You don't known where to start, where to live, no money, no friends, nothing* (...). She had suicidal thoughts. *I was terribly upset, I wanted to jump off a bridge* (...). She inherited a post-war stigma, "the enemy of the nation" – "a wretched moral midget of the reaction[4]". As Maria said, (...) *I've gone through so many things, everything. I was strong, and then I fainted. I was completely broken. (...) I didn't exist ... I lost my identity ... "point zero"... I was a "hound".* This situation is consistent with the "floating" concept established by Bron (2000), who claims that to be "floating" relates to an experience of being fragmented, in the middle of "nowhere", without a feeling of present or past and of being unable to create a future. Bron (2000) describes floating as a deep feeling of being paralyzed by events, circumstances or experiences that a person cannot deal with in many aspects: psychological, emotionally and socially. It is a kind of trap; the person is stuck and unable to move either backwards or forwards. The person might feel overwhelmed. 'Coping with floating engages affective and cognitive facilities' (Bron, 2007:216). This concept of "floating" can also used to understand identity crises (Bron & Thunborg, 2015).

The post-war experiences were meaningful for the rest of Maria's life. She struggled with the stigma of what she self-described as *"the wretched moral midget of the reaction"* and some other difficulties for many years. As she said, *I did not know* (what to do), *to defend myself, to run away, to create or to stay, nothing at all ... fate played with me, I wanted to deal with it ... I could not ... and everything floundered so*

much. While Maria had a daughter, she never got married. She worked hard and used all her capacities to create "a normal" home and family for her daughter. This *abnormal life*, as Maria called it, changed after her migration to Sweden, though she *didn't plan to stay*.

3. Experiences of migration

Migration to Sweden opened a new and transformative chapter in Maria's life. As she said, *…the second part of life… (was) the better one (…)*. Maria started to experience a relatively normal life in Sweden compared to her previous life in Poland. As she said, *finally, there is something normal, stable. Sweden impressed me with its order, its normality, and after all my life, there is some kind of normality*. Already retired, Maria sold her house in Poland and came to Sweden to be reunited with her daughter. When she migrated, she effectively started a new life. As she said, *I was full of life. I was 60 years old, but I was not old. I did not think that I was retired; I was already on the run. No, I had thousands of plans. I started reading, walking, meeting people, new tracks. First of all I was reading a lot and I was very interested in it.*

For Maria, the Swedish language was the most important thing to learn and adapt in her new, host country. As she said, *I started to learn the* (Swedish) *language first and foremost, because I thought to myself as I arrived here, 'I have to live yet'*. Attending a Swedish course and meeting new people meant *the world has become wider (…). It opened the window to the world* and helped Maria to better understand Swedish culture as well as some of the people she met and befriended in the course. As she said, there was *(…) such a community at this course, I learned such contact with the Swedes: how do they behave, common food, traveling by car, visiting in Sweden. So, this course showed me Sweden and introduced me into everyday life*. People who she met helped her to move into her own apartment, independent from her daughter, and become independent in Sweden. As she said, *I started Swedish life*.

Maria inevitably experienced cultural shock (Oberg, 1960; Winkelman, 1994). As she said, *Sweden is another world … honesty … order … decency … shops full of things … the possibility of buying*. Living in Sweden gave Maria freedom and she started reading historical books

and seeking out people she knew from wartime. As she said, *my life here began with such liberty, a different kind, open to the world, mainly in contact with London[5] and the Home Army*. In the meantime she become an important person for the history of Poland. In the Polish town where she was persecuted and couldn't stay after leaving prison, they built and named the Chamber of Memory in her honor. Nowadays, she is very much honored in Poland. She said, *Who would have thought, first "spits" and then "strokes"*. However Maria doesn't feel comfortable *(...) to be put on a pedestal, I don't know who I am. (...) I can't play this role.*

4. Learning from a biographical perspective

In biographical learning all experiences become integrated and create a new construct of meaning. Bron (2006:19) claims that 'Biographical learning consists of experience, knowledge, reflection, self-reflection and of all the lessons that follow experience enclosed in our life stories'. Moreover, Alheit (2009:65) argues that 'Biographical learning takes place in social structures and cultural contexts of interpretation' encompassing everyday life. Therefore, in analyzing what is learned at an individual level, as in Maria's story, it is necessary also to consider the external structures and the objective elements that challenge the course of a life (Alheit & Dausien, 2002). There is also a close link between a narrative and other social, cultural and ideological contexts (Denzin, 1989). A narrative is the common form of biographical representation (Bron, 2007), and its output is never an isolated product. From a biographical perspective, learning isn't a separate part of life. Therefore, by analyzing all collected data, exemplified by Maria's life history, some new fields of learning emerge.

Many parts of the formal education (school, study), non-formal education and informal learning continuum are crucial in Maria's life. As a young woman, she was an active member (a soldier) at the Home Army during the Second War World, where learning and changes were occurring every day. As she said, *I was constantly learning, constantly changing (...)*. She was learning to survive, to be alive and to fight. Then, as Maria described, there were the *strong experiences* in prison, of living with other women in a small cell. As she said, (...) *in the prison I experienced (learnt) the most, (from) the internal meetings with other people*. [I learnt] *that I can live with people*. She learnt that there

are some situations that until we have experienced them, we don't know ourselves or what our reactions will be. We might only guess. However the reality could be completely different from that imagined. Maria learnt what a lie and the truth means. In some circumstances for Maria, there was no border between them, becoming lost in what is the truth was and was not. After leaving prison, she was persecuted. She learnt again to survive, to be alive and not give up in the "new political system". She wasn't prepared for being with someone, to build a family. Therefore she tried her best but she sometimes failed. She also learnt to be a mother.

Maria was a lifelong learner. As she said, *(…) learning all the time… is a must …* Migration to Sweden led to experiences of … *normality in Sweden versus abnormality in Poland.* She was learning a new culture and a new language. She already knew German, so learning the second foreign language, being age 60, wasn't such a big deal. The Swedish course, the place of non-formal education, became an important part in Maria's life. She met "significant others" (Sullivan, 1947), people who helped to transform her life. As Maria said, *it is also essential to meet the "right" people. One of the "right people"* was a Swedish theatre director who invited her to play in the theatre with retired actors. As an actor she learnt the Swedish accent, and as she said, *a new wave of theatre people* came.

Maria was engaged in many NGOs living in Sweden, most of which were focused on the history of Poland. As an active member she traveled and learnt a lot. All her life she was open to the younger generation, *(…) talking with youngsters … trying to understand them (…).* Intergenerational learning was a part of her life.

Although, as she said, *I was one step away from death all the time,* she stayed positive and *(…) interested, I have to tell you that I lived in a very interesting, difficult time, which required of me to change, constantly and with difficulty, but interestingly, and I fitted into this life. I participated in this difficult life. I passed some examination of my life, atypical, not so schematic … I lived not to according to the given scheme (…).*

War and post-War experiences brought different kind of emotions, which she internalised for quite a long time. It took time for her to learn to release anger and hate, to forgive and to become calm, and not to become irritated. All of her life she learnt to accept what life brings, and

as she said, towards the end of her life, (...) I have stayed independent as long as possible ... not giving up (...). And she learnt to enjoy life to have fun in later life. ... Small things enrich your life (...). Clearly I learn a lot from Maria as well.[6]

Biographical narratives like Maria's reveal how the continuity of 'being oneself' is created and illustrates how the process of biographical learning can take place over a lifetime. Maria's case study illustrates the complexity of learning and ageing in the context of migration from the perspective of life experiences. However, as Bron (2007:219) observed, ' ... the stories people tell are temporal products showing that the individual life is never ending and always open to new experiences, negotiations and changes, often unexpected, as are identities and social roles'. As Alheit (2002) suggests, everybody has a unique biographical plan and a lifetime of learning, which can be revealed through the analysis of narrative biographies.

Conclusion

Analysis of the collected data illustrates that ageing is part of the process of forming and transforming identities (Bron & Thunborg, 2011) in relation to the three key components: life course, identity and significant learning experiences (Antikainen, Houtsonen, Huotelin & Kauppila, 1996). In the context of forming and transforming identities, identity might be seen as re/constructed through biographical learning.

I have gained some useful insights from the comparative research of Ogbu (2002). He suggests that if we want to understand the differences between minority groups and the dominant group(s) we need to know and understand the process of incorporation into a minority group, in particular the way and how the dominant group treats them and what their life histories are. Therefore, we should firstly learn about a migrant's life experiences before designing actions that may be required to plan and facilitate learning in older age, as well as to bring about changes to improve the quality of life of older people in a host country. This study suggests that there is still a lot of research to do in forming and transforming identities in the context of migration and learning in host countries, especially for diverse groups of older migrants. While this research focusing on one older migrant might be seen as a small contribution, I consider that the insights in this paper provide

enough evidence to suggest a need to pay more regard to the process of ageing (as a subjective process in an objective world) in the context of migration using a biographical perspective.

Whilst my paper provides only one illustrative life history, it suggests that the process of migration goes well beyond representing just one critical life event. This case study is arguably illustrative of many other diverse life histories of people from older generations of migrants from diverse countries who have experienced many, similar radical changes in their lives. It illustrates that older migrants cannot be simply reduced to their migration experience, but that they also carry a lot of other relevant life experiences to the new host country with them, and rich opportunities for learning: lifelong and lifewide.

Older adults, particularly senior migrants, do not represent an attractive group in modern Western society. They are seen more as "recipients" rather than "donors" (Banno Gomes, 2002). This group is marked by a double stigma: emigration and ageing. I have become aware of a wider research lacuna in relation to older migrants: in this specific case, that Polish immigrants in Sweden are not sufficiently interesting even for research by The Multicultural Centre located in Stockholm in *Botkyrka komun*. There is no published research about Polish immigrants, despite them becoming an increasing proportion in Swedish society. This is one more reason to conduct future research into Polish migrants in Sweden from different generations, also from a biographical perspective.

Endnotes

1   She is the reporter, the journalist and the writer.

2   The main resistance force in German-occupied Poland was the Armia Krajowa ("Home Army"; abbreviated "AK"), which numbered some 400,000 fighters: one of them was Maria. Throughout most of the war, AK was one of the three largest resistance movements. The main goal of the AK was preparing and conducting the national uprising in case of advancing frontlines or general collapse of the German armed forces. There were complex hierachical structures - staff, high commands of arms and services, territorial commands (regions, and on lower level - districts), weapons were collected, officers and soldiers were trained, information about enemy was gathered (Polish contribution to the Allied victory in World War 2 (1939-1945).

3   The term łapanka comes from the Polish verb łapać ("to catch"). The term was also used for describing the tactic of cordoning-off of streets, and the systematic searching of buildings. Such roundups, łapanka, were carried out by the Germans during the Second War World. However the Soviets used similar tactics to round up middle-class Poles in the part of Poland that they occupied following the 1939 invasion of Poland. People were transported to labor camps in remote regions of the Soviet Union or into prisons after the Second War World.

4   The propaganda term used during the People's Republic of Poland to soldiers of the Home Army, in Polish, Armia Krajowa (AK).

5   In London there was the post-war emigration, which arrived with General Anders.

6   She was an open mind person; she had to distance herself and she made fun of herself. Maria died on 1st of August 2012, on the anniversary of the Warsaw Uprising. It is meaningful date for people who had fought during the Second War World.

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Fifty years of learning by older adults in Aotearoa New Zealand

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This paper reflects on the history of adult and community education (ACE) in Aotearoa New Zealand with special reference to older people's learning. The paper adopts a critical framework and draws on both primary and secondary sources. Key economic, political, social, demographic and cultural forces are discussed along with the huge growth in tertiary education, the increasing pressures on people to continue their education in later life, and the impact of social movements on this expansion. This growth in tertiary education has not been paralleled by a comparable growth of ACE, and I argue that the history of ACE is in fact more complex and subtle, with many different stories being told. I then discuss the history of older adults' learning and report briefly on some ACE programmes which have emerged over the years and some trends in government policy with special reference to the New Zealand Positive Ageing Strategy and its implications for older people's learning. In the light of the positive ageing rhetoric I also raise questions about the very limited government investment in ACE generally and in particular in older people's learning.

Keywords: *history, older people's learning, adult and community education, New Zealand Aotearoa, positive ageing.*

Introduction

This paper reflects on the history of adult and community education (ACE) in Aotearoa New Zealand from the 1970s to 1916, with special reference to the learning and education of older adults. The paper locates ACE within the context of tertiary education. It adopts a critical perspective (Bowl & Tobias, 2012) and draws substantially on my recent history of ACE (Tobias, 2016) as well as a wide body of primary and secondary sources including documents and reports from the New Zealand Office for Senior Citizens Te Tari Kaumatua.

For the purpose of the paper the focus is on learning by older adults defined as those 65 years and older. It is important to note however that any definition of 'older adults' is problematic. Although chronological age may be a significant factor influencing people's lives, learning experiences and perspectives, and may be a convenient marker of common historical experiences of successive cohorts, it is not a factor which determines people's work, welfare or health status or their learning interests or capacities.

Background

Over the past fifty years – from the 1970s to 2016 - the scope of tertiary education in Aotearoa New Zealand has been enlarged and its shape transformed. This has occurred in response to a number of economic, political, social and cultural changes including growing inequalities under the influence of neoliberal policies, and the rise of several progressive social movements, particularly those associated with the Māori renaissance (Tobias, 2016).

The period was also one of major demographic change. In common with many other countries, the number and proportion of people living to an older age increased significantly. Between 1984 and 2014 the number of people age 65+ doubled to reach 650,000 and the percentage of the total population 65 or over had risen from 10 to 14 per cent (Office for Senior Citizens/Te Tari Kaumatua, 2015a; Statistics New Zealand).

The growth of tertiary education

Over the past 50 years there has been a huge growth and diversification in the provision of post-compulsory and tertiary education (Findsen, 2006). Several forces contributed to this. They included increased endorsement of education as a key factor in human resources development (HRD); growing diversification and privatisation of education; increasing commodification of education; the continuing professionalisation of occupations & growing credentialism (Tobias, 1999, 2003); and the expansion of managerialism and welfarism in education (Fitzsimons, 2004). They also included the rise of progressive movements e.g. the environmental, peace, women's, LGBTI and other social change movements, the Mäori renaissance and the struggles by Mäori for recognition of their political authority, their language, culture and land; and the significance of organisations of civil society (Tobias, 2016:77-78).

There has also been an increase in the number and range of different types of institutions and organisations providing tertiary education. In the 1960s the field was dominated by the universities. Technical institutes were only beginning to emerge out of the technical high schools; there were a few private colleges; several training workshops were run by government departments, and the provision of ACE was dominated by universities, schools and Workers Education Associations (WEAs). By the early 2000s the picture had changed completely. Its scope had broadened to include 35 public tertiary education institutions (TEIs) comprised of eight Universities, 20 Polytechnics, four Colleges of Education and three Wänanga (Mäori Universities), over 500 registered Private Training Establishments (PTEs), 46 Industry Training Organisations (ITOs), nine Government Training Establishments (GTEs) and 17 Other Tertiary Education Providers (OTEPs) (Ministry of Education/Te Tahuhu o te Matauranga, 2002; 2004). It also included a number of ACE providers and Rural Education Activities Programmes (REAPs), ACE funded schools, voluntary organisations and community groups (Findsen, 2006; Tobias, 2016:77-78).

Overall trends in ACE

The growth of tertiary education has not been paralleled by a comparable growth of ACE. The history of ACE is more complex and subtle. It is in essence a social and educational movement (or part of

a wider movement) at least as much as it is a sector of education or a cluster of organisations (Tobias, 1996).It is therefore perhaps not surprising that many different histories may be told. The predominant ones, however, have been stories of ebbs and flows in the fortunes of ACE in response to changing imperatives.

One feature of ACE that has remained relatively constant is that, in relation to most other sectors of education, it has generally been under-funded and under-resourced by the state – the educational 'poor cousin' (Newman, 1979). A second is that, while it has depended on an army of volunteers or unpaid workers (Peet, 1997; Terry, 1994), and consisted for the most part of NGOs, voluntary organisations and community groups of all kinds including REAPs, it has also generally been supported, albeit at the margins, by schools, community colleges, polytechnics, wänanga and universities (Tobias, 2016:78). A third feature of ACE that distinguishes it from other sectors is that people of all ages including a significant number of older people have participated in ACE programmes. Older people do participate in formal education. However they participate in larger numbers in ACE. Data are lacking on the extent of this participation. However it seems probable that older people's levels of participation in ACE may have ebbed and flowed over the years with high points being reached in the mid-1970s and mid-2000s and lows in the mid-1990s and mid-2010s. (Tobias, 1991, 2007; Tobias & Bowl, 2012).

Trends in public policies on ageing and learning programmes for older adults

The 1970s and 1980s

As has already been noted the number and proportion of older adults participating increased significantly over the years. In the 1970s the Canterbury Workers' Education Association (WEA) led the way in developing its Wider Horizons day-time programme, probably the first ACE programme specifically intended for older adults (Roth, 1974, 1977).

In the 1980s several policy and programme initiatives were launched specifically addressing the learning needs of older people. One early response to demographic change was the publication by Age Concern of a discussion paper which drew attention to several overseas programmes of learning for older people and outlined a set of proposals

for the development of lifelong learning opportunities in New Zealand (Mackie, 1984). In the same year the New Zealand Social Advisory Council published a report which recommended that the then National Council of Adult Education (NCAE) should 'encourage informed public discussion on attitudes to later life, taking the initiative to promote this concern through existing networks' (Williams, *et al.*, 1984:19). These recommendations, that highlight the importance of providing learning opportunities for older people, were supported by Age Concern. Between August 1984 and 1987 the NCAE Working Party on Ageing and Education promoted a wide range of activities including television and radio programmes and regional seminars to achieve its objectives (Ageing and Education Working Party, 1987).

In 1986 the Royal Commission on Social Policy was established by the Prime Minister to counter increasingly dominant market-driven neoliberal discourses. It emphasised the need to change the attitudes and understandings of many older people themselves, as well as those who cared for them and the wider public – a set of educational tasks which were also identified by the Ageing and Education Working Party (Royal Commission on Social Policy, 1988). The 1980s also saw a number of local ACE initiatives across the country involving educational institutions, local authorities, social service agencies and voluntary organisations (O'Rourke, 1984; Patterson, 1999; Somerville, 1987; Tobias, 2000).

The 1990s

The late-1980s and 1990s saw the growth of educational travel programmes for older people both internationally and in New Zealand (Russell, 1993). These programmes, mainly sponsored by the Australian and New Zealand College for Seniors in the 1990s, grew into successful commercial enterprises.

In addition, from the early 1990s the U3A movement became established in many communities throughout New Zealand. The first U3A groups were set up in Auckland in 1989 and Christchurch in the early 1990s (Heppner, 1994a, 1994b, 1996; Swindell, 1999, 2000). These groups, all autonomous and self-funding, varied widely in their organisation and formality. Some focused on research, study and discussion; others organised regular series of lectures by visiting authorities; while others drew primarily on members themselves to give

talks and lectures. By 2016 there were 73 U3As around the country (New Zealand U3A, 2016).

The 1990s and 2000s also saw the establishment of SeniorNet throughout New Zealand. SeniorNet is a non-profit community-based organisation which aims to give people over the age of 55 access to computer technologies and opportunities to acquire and share their knowledge and skills, relying on peer tutoring. SeniorNet originated in the USA in the mid-1980s but grew rapidly in Aotearoa. By 1998 there were 23 and by 2016 there were 76 SeniorNet learning centres (Clarke, 1998; SeniorNet Canterbury, 1996; SeniorNet New Zealand, 2016).

In addition ACE programmes continued to be offered by NGOs, schools, REAPs, polytechnics and universities. Of great significance as part of the Māori renaissance, and following pressure from the Waitangi Tribunal, the wānanga of old were gradually re-established in modern form.

On the policy front, in response to sustained opposition to a proposed superannuation surcharge and in accordance with recommendations by the Royal Commission on Social Policy, in July 1990 the Labour government established a post of Minister for Senior Citizens and appointed the first Minister. In addition, it signalled its intention to establish a new Ministry for Senior Citizens. Almost immediately this initiative gained bipartisan support, and in November 1990 when a National government was elected, it also appointed a Minister for Senior Citizens. At the same time however the new government set in place educational and social policies firmly grounded in neoliberal and conservative discourses. Nevertheless in response to political necessities it moved cautiously and pragmatically on policies relating to older people. A Senior Citizens Unit (instead of a Ministry) was created within the Department of Social Welfare, and in March 1992 the Minister for Senior Citizens announced the establishment of a Senior Citizens Policy Advisory Council to help to 'represent the interests of elderly people in Cabinet' (Levine & Roberts, 1993:253). In addition, the early 1990s saw human rights legislation amended to prohibit discrimination on grounds of age across a wide range of areas.

Through the early-1990s the Senior Citizens Unit, acting with the advice and support of the Advisory Council, did what it could to promote the interests of older citizens. By the mid-1990s however there was growing recognition of the need for a more broadly based Positive

Ageing Strategy. This idea which grew out of the work of the Senior Citizens Unit, working alongside Age Concern and other voluntary organisations, received strong support from the Prime Ministerial Task Force on Positive Ageing, appointed by the National/New Zealand First government following the 1996 general election. In mid-1997 this Task Force produced a wide-ranging report (Prime Ministerial Task Force on Positive Ageing, 1997).

Among other things, it recommended: establishing flexible approaches to working life, education, care giving and retirement; prohibiting compulsory retirement, communicating positive and diverse images of old age; preparing an environment in which adults of all ages could plan and manage their own futures; freeing up workers for voluntary activity, career planning and skill acquisition through life, greater mentoring schemes in business, involving all ages in school and creative endeavours; strengthening policy development and service delivery; achieving greater appreciation of diversity; and stronger intergenerational and voluntary commitments. In many respects this report was a remarkable document: Although it drew on neoliberal discourses it also reflected other more pragmatic discourses which had gained a parliamentary voice within the system of proportional representation introduced in the 1996 general election. Whilst each of the recommendations contained potentially significant educational dimensions this was seldom made explicit and its implications in terms of the funding of ACE and learning programmes for older people were largely unrecognised or ignored.

A 1992 United Nations resolution led to 1999 being proclaimed the International Year of Older Persons. The theme for the Year 'Towards a Society for all Ages' was intended to embrace people of all ages and many sectors and organisations. In New Zealand the main objectives of the Year were to promote positive attitudes to ageing, to value older people, and to prepare for an ageing population. Key messages included valuing older people, promoting their independence and greater participation and integrating older people in society, recognising their contributions, and promoting intergenerational activities.

Activities organised included a range of ACE programmes. Volunteer Community Coordinators (VCCs) were appointed in 29 locations throughout New Zealand. Their role was to encourage local involvement

in activities and to ensure that the Senior Citizens Unit was informed about planned community events. They were nominated through older people's organisations such as Age Concern and by iwi/Māori organisations. A small initial grant was provided to reimburse each nominating organisation for the volunteers' expenses and a further grant was later provided to contribute to the costs of local events. During the year, the Senior Citizens Unit maintained regular contact with the VCCs, providing administrative and other support. The Final Report on the year stated that, 'The VCCs played a critical role in developing networks within their communities and encouraging activities at the local level' (Ministry of Social Development/Te Manatu Whakahiato Ora, 2000:11). This report also listed the large number of local activities which took place throughout the country and stated that an important outcome of the national strategy was 'the strengthening of community networks, including the development of positive relationships and understanding between generations' (Ministry of Social Development/Te Manatu Whakahiato Ora, 2000:3).

The early-2000s

After the general election in November 1999 the newly elected a Labour/Alliance government moved to review the entire field of tertiary education. To this end a Tertiary Education Advisory Commission (TEAC) was set up which recommended, inter alia, the establishment of a Tertiary Education Commission (TEC) to be responsible for all forms of tertiary education including ACE. In December 2002 the *Education (Tertiary Reform) Amendment Act* was passed setting this Commission in place.

In 2000 Government also took steps to set up a Positive Ageing Strategy. This formed one part of a new social development strategy (Ministry of Social Development/Te Manatu Whakahiato Ora, 2001). The Advisory Council for Senior Citizens was asked to develop an initial set of principles as the basis for extensive consultation during 2000. Thirty-four community consultations were held around the country, including four meetings specifically for Māori and three for Pasifika people. In addition over 100 leaders from the voluntary, business, health, education, local government and central government sectors attended a Forum in Wellington organised by Age Concern New Zealand. Included among the thirteen recommended 'Points of Action' was one

of 'Fostering life-long learning for all age groups' (Senior Citizens Unit, 2001: 30).

On the basis of this consultation, in April 2001 the Minister for Senior Citizens launched the New Zealand Positive Ageing Strategy. It provided a set of ten 'policy principles' (Senior Citizens Unit, 2001:16-17) and ten 'priority goals' (Senior Citizens Unit, 2001:19-23) each linked to 'action plans' which were to be reviewed annually. The Strategy clearly identified a role for education. It stated that, 'The ability to age positively is assisted by good investment in education throughout life ...' (Senior Citizens Unit, 2001:10). One of the ten goals anticipated: 'Increasing opportunities for personal growth and community participation', explicitly including:

> ... improving educational opportunities for all, implementing adult education and training initiatives, encouraging utilization of the experience and skills of older people, and promoting and supporting volunteer organisations' (Senior Citizens Unit, 2001:23).

The Strategy argued that until recently much of the discussion of issues of ageing both in New Zealand and internationally had focused on the problems and costs generated by the growing number and proportion of older people. In contrast to this negative, dependency view of ageing and older people, the Office for Senior Citizens stated that:

> Active ageing, positive ageing, productive ageing and successful ageing are all concepts that advance the theory of ageing as a lifelong process, where positive attitudes to ageing and expectations of continuing productivity challenge the notion of older age as a time of retirement and withdrawal from society. The focus is on lifetime experiences contributing to wellbeing in older age, and older age as a time for ongoing participation in society. (Office for Senior Citizens/Te Tari Kaumatua, 2002:39)

In summary although the Positive Ageing Strategy highlighted the significance of older people's learning and anticipated ACE's important contribution, no concrete recommendations were made on the kind and level of government financial support that would be required. Presumably it was thought that programmes would be self-funding or that this would be taken care of by the TEC.

In addition to the overall review of tertiary education instituted by the Government in 2000, separate groups were appointed to review every aspect of education and training and social policy. A central aim was to move agencies and institutions from reliance on market driven, competitive mechanisms and policies to those that were more suited to a progressive social democracy. One of these groups was the Adult Education and Community Learning Working Party. The report of this group (Adult Education & Community Learning Working Party, 2001) embraced all aspects of ACE. One part the report drew attention to the role of ACE in working with those in greatest need including many older people, contributing to the strengthening of civil society, and identifying new national educational needs. The report included a review of research, and one section identified selected studies pointing to the benefits of educational participation for positive ageing (*ibid.*:66).

It argued that an ageing population would need ways to maintain their sense of connection and usefulness to society. ACE, it argued, had always played this important role. It had provided a wide range of learning opportunities and allowed older people to teach or tutor, often on a one-to-one or voluntary basis, thereby sharing their knowledge and skills with others (*ibid*:14). The report also argued that

> *ACE needs new structures and processes to ensure that all providers are of a high standard, and that they are responsive to the needs of key population groups, including Mäori, Pacific people, new migrants and refugees, the disabled, older adults, some groups of women, rural people and increasingly, men"* (ibid.:29).

In light of this report in 2003 the Government endorsed the following national goals for ACE. Funding of ACE programmes by the state was to hinge on whether they contributed to: (1) strengthening social cohesion; 2) meeting identified community learning needs; (3) encouraging lifelong learning; (4) targeting learners whose initial learning was not successful; and (5) raising foundation skills.

The following few years saw the implementation of the new policies and the continuation and expansion of some forms of ACE, including ACE NGOs, ACE supported by schools, polytechnics, REAPs, universities, wänanga, U3As and SeniorNet groups. The period also saw the continuation of the New Zealand Positive Ageing Strategy, administered

nationally by the Office for Senior Citizens/Te Tari Kaumatua in the Ministry of Social Development/Te Manatu Whakahiato.

The impact of the Strategy was indicated by the wide range of 'actions' taken by central government agencies, the steady increase in the number of local councils' involvement (Office for Senior Citizens/Te Tari Kaumatua, 2008b: iii), and by the increasing number of Volunteer Community Co-ordinators, which grew from 29 in 1999 to 40 in 2007 (Office for Senior Citizens/Te Tari Kaumatua, 2007: iii) and about 50 in 2008 (Office for Senior Citizens/Te Tari Kaumatua, 2008a:19).

The early 2000s also saw the setting up of a large number of diverse Men's Sheds across New Zealand. In general they aimed to 'bring men together in one community space to share their skills, have a laugh, and work on practical tasks individually (personal projects) or as a group (for the Shed or community)' (Menzshed New Zealand, 2016). Their primary focus was on engaging with older men no longer in the paid workforce. There is evidence that they have contributed significantly to the health and social wellbeing of their members especially in breaking down the loneliness and isolation of many men on their retirement (Golding, 2015; Snow, 2012). Although mainly intended for men, women have also been involved with many Shed organisations.

Perhaps the first community workshop, 'Claystore', was launched in the 1980s in Devonport, Auckland (Bruce, 2011). However it was not until 2007 that the first Men's Sheds were opened in Hamilton, Mosgiel and Dunedin in December 2007 and five others in Thames, West Franklin, Naenae, Wellington and Christchurch by March 2008. Drawing inspiration from Australia (Bruce, 2007), the Men's Sheds movement grew rapidly over the following years and by 2015 there were more than 90 men's sheds set up throughout the country.

From the outset links were established with schools, REAPs and other ACE organisations as well as several social service and public health agencies and local authorities. Financial and logistical support was obtained from some of these agencies. However, by way of contrast with Australia, no financial support was received from the central government. In September 2013 a national organisation, Menzshed NZ, was established with the aim of providing support for member sheds and facilitating public access to them (Menzshed New Zealand, 2016).

The period since 2008

In October 2008 a National-led government was elected and over the following years significant cuts were made in the funding of ACE programmes. Inevitably this reduced the availability of educational opportunities for older adults (Tobias, 2016:71-73). The Positive Ageing Strategy was retained, albeit with significant changes in priorities and in the work of the Office for Senior Citizens. In 2010 a new project was launched which focused primarily on the place of older people in the economy, and early in 2011 the first in a series of publications entitled 'The Business of Ageing' was published (Office for Senior Citizens/ Te Tari Kaumatua, 2011). This report focused on what it described as the 'two opportunities for New Zealand's growth over the next 40 years'. It highlighted firstly, the increasing number of older people with high levels of skill 'who choose to remain active in the workforce', and secondly, 'the growing consumer market among older people who were healthier, better educated and have more spending power than any other generation reaching 65 in New Zealand's history' (Office for Senior Citizens/Te Tari Kaumatua, 2011:1).

This was followed in 2013 by the publication of a 40-page booklet, 'Older New Zealanders' (Office for Senior Citizens/Te Tari Kaumatua, 2013b). It outlined many of the actions the Government was taking to 'deliver on the vision outlined in the Positive Ageing Strategy to enable older people in New Zealand to be healthy, independent, connected and respected' (Office for Senior Citizens/Te Tari Kaumatua, 2013b:8). Also in 2013 the Office for Senior Citizens produced an update on the 2011 report on 'The Business of Ageing' (Office for Senior Citizens/Te Tari Kaumatua, 2013a), undertaken in response to increases in older people's participation in the labour force and new projections from Statistics New Zealand of their future participation rates. It also considered other changes e.g. changes in tax rates, since 2011.

The Office for Senior Citizens published no major reports in 2014 but produced two in 2015. The first was the report on the Positive Ageing Strategy (Office for Senior Citizens/Te Tari Kaumatua, 2015a), building on the 'Older New Zealanders' report of 2013. It focussed on key aspects of an ageing society and reasserted the continuing significance of the ten goals of the Positive Ageing Strategy. It also documented key trends in positive ageing and reported on progress towards achieving each of

the goals. The second was an update of the 2011 publication on 'The Business of Ageing' (Office for Senior Citizens/Te Tari Kaumatua, 2015b). It incorporated data from Statistics New Zealand as well as post-2011 data which showed that in the coming decades older New Zealanders were likely to make an even greater contribution to the economy than was predicted in the 2011 and 2013 updates. Its findings highlighted a number of trends: Older people were becoming a large and growing consumer group, playing an increasing role in the paid labour force (New Zealand already has one of the highest labour force participation rates by older people in the OECD). Older people's earnings from paid work also continued to increase including their tax contributions, along with their contributions to the voluntary sector.

Despite the comprehensiveness of the 2015 reports they failed completely to draw explicit attention to the many actual and potential contributions of education and especially ACE to ageing policies. Indeed ACE has been dropped entirely from the tenth goal of the Positive Ageing Strategy despite its key potential role in increasing opportunities for personal growth and community participation by older people.

Conclusion

This paper reflects on the history of ACE and in particular the education of older adults in Aotearoa New Zealand from the 1970s to 2016. In the light of population ageing it describes some policy and programme trends and initiatives in relation to ACE, especially those relevant to older adults. In particular it describes the emergence of the Positive Ageing Strategy in the 1990s and early 2000s, a strategy which was intended to move the dominant discourse about ageing away from negativity and dependency to one which privileged the positive and emphasised the contributions of older people to society.

The paper argues that while most forms of education including ACE and older people's learning were shaped and re-shaped by neoliberal and conservative discourses during this period, these discourses were challenged by social democratic and pragmatic discourses and by progressive social movements, including those associated with the Māori renaissance.

On one hand neoliberal discourses rose to prominence in the mid-1980s and were especially powerful in the early-1990s and in the period from 2008.

The paper notes the growing impact of privatisation, commodification and credentialism on tertiary education, and the increasing withdrawal of state funding for ACE in these periods. On the other hand social democratic discourses came to the fore in the early-2000s during which time the state took a more active role in supporting ACE and the development of lifelong learning as suggested by the Positive Ageing Strategy.

From 2008 however, although the government retained the rhetoric of positive ageing, its focus was narrowed, and state funding of ACE programmes including those that appealed to older adults was largely withdrawn. Since that time a 'disconnect' has emerged between the state's Positive Ageing Strategy and its policies on older people's learning. Programmes for older adults have been driven mainly either by those with the necessary material, social and cultural assets to cover the costs of participation, or they have been largely dependent on voluntary unpaid contributions.

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Robert Tobias, who is currently Adjunct Senior Research Fellow, College of Education, University of Canterbury, migrated to Australia with his wife, Bertha, in 2015. An older learner now himself, he has for many years been an organiser, teacher and researcher in adult education. His areas of research interests both in South Africa (where until 1978 he was director of extra-mural studies at the University of Cape Town) and in New Zealand Aotearoa have included most aspects of lifelong learning and adult and community education policy and practice.

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Learning for older adults in Portugal: Universities of the Third Age in a state of change

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U3As have their origin in 1973 in Toulouse, France, with Professor Pierre Vellas. This French influence was also felt in Portugal and the first Portuguese U3A opened its doors also in the 1970's. However, from inception the Portuguese reality was very different from the French model, especially in regards to its promoters. However, both in France and Portugal, these original models have since undergone significant changes. Within this context, this study seeks to analyse this shift in the organisation of U3A, attempting to understand, amongst other factors, who are the social players behind the change, their goals, and how they are organised. To achieve these research goals, several data collection techniques were used such as document/text analysis of information on the different educational opportunities on offer to older adults, especially U3A, as well as conducting interviews with some leaders of U3A. Theoretically, the work of several authors who have analysed U3A such as Aline Chamain and Marvin Formosa are considered as well as authors who have researched third age policies, in particular Anne-Marie Guillemard. In conclusion, the present work shows U3As in Portugal present themselves in a different context in terms of their promoters – as either tertiary institutions or as private associations.

Keywords: *Universities of the Third Age, learning, models, education policies, older adults, Portugal.*

Introduction

The advent of Universities of the Third Age in Portugal took place in the 1970s and were influenced by their French counterparts, also created in the same decade, and the so called Toulouse model. Despite the French influence, it is possible to identify several differences in the way the Portuguese Universities of the Third Age operate. From 2000 onwards several changes have taken place in the domain of Portuguese Universities of the Third Age such as a significant increase in their numbers and their emergence within the setting of tertiary education institutions.

The present work aims at a sociological analysis of the changes these universities have experienced. To achieve the goal, my paper frame the Universities of the Third Age within the context third age and adult education policies in Portugal and explore some of the premises of such policies.

In terms of methodology, an exploratory study was conducted to account for the changes that took place in these universities using several data collection techniques. Namely, a document analysis was undertaken of different websites running Training Programs for Seniors as well as documents published by organisations dedicated to ageing and the education of older adults. I also conducted an interview with a leader of one of the older U3As, founded in 1994. Briefly discuss the existence of two main models – those strategically aligned to universities; those opposed to links to universities. The older U3As are different from the newer ones in the sense that many of the older ones are still being managed by the older adults themselves. The leader was also chosen for interview because of his critical stance regarding certain changes in the U3As in Portugal.

The present study is divided in two parts. The first part deals with the emergence of U3As in Portugal as well as the third age and education policies contexts in which they formed. In the second part I analyse the changes that took place in the area of third age and adult education

policies, both nationally as well as internationally, and how, in turn, they framed the changes in the domain of U3A.

The emergence and growth of Universities of the Third Age in Portugal (from 1976 to 2000)

In 1976, third age policy was enshrined in the Portuguese Constitution and with it a new period started in the way old age is managed. From this date onwards there was a change in the way older adults are treated. One of the most visible examples is the transformation of asylums into homes (Veloso, 2011). The third age policy also contributed to the closer integration of older people into secondary groups such as unions, organisations promoting personal development or social activities, recreational and cultural associations such as the U3As (Durandal, 2005). According to this new policy older adults were encouraged to continue living in their own homes, creating the necessary conditions for the older adults to remain socially integrated. The policy adopted the premise that it is possible to delay (mental and physical) ageing through a range of different cultural, recreational and sports activities (Veloso, 2011).

The first University of the Third Age in Portugal opened its doors in 1978, a time when the new guiding principles of the third age policy were beginning to be implemented, in particular the principle that older adults remain in their own homes. As a consequence, new services that translated this new policy of dealing with old age started to be implemented in homes, day centres, recreational centres and home support services. All of these aimed at providing support in the area of social welfare, targeting mainly the elderly who are dependent and with economic needs (Veloso, 2011).

The first Portuguese University of the Third Age defined itself as an educational and cultural institution that aimed at promoting the image of older adults as capable people who have a useful role in society and can contribute to its development. This organisation did not place itself in the area of welfare from a perspective of providing assistance to "poor old people" with financial needs or social and/or physical limitations. The university aimed mainly at older adults who were autonomous, active and financially independent. Mr. Herberto Miranda, a civil engineer, with the support of his wife, was responsible for the creation of the first Third Age University in Portugal (Veloso, 2001, 2011).

The creation of the first U3A was based upon and expanded on the original French 1973 project of the University of the Third Age in Toulouse (Veloso, 2011). The Toulouse model, as a reference in the Portuguese project, is also seen in the invitation made to Professor Vellas, the original founder of the Universities of the Third Age, to participate in the 1978 Seminar aimed at defining the goals of the emerging University of the Third Age.

From the analysis of the proceedings of the Seminar, it is possible to identify the ideas and philosophy behind the original Toulouse model, namely the promotion of active and autonomous lifestyles to achieve a delay in ageing (Veloso, 2011). Vellas, in particular, argued that Universities of the Third Age and their related activities played an important role in delaying ageing.

Therefore, all these institutions aimed at a common concept of delaying ageing through maintaining the older adults within their own environment, encouraging them to remain independent and participate in intellectually stimulating activities, promoting their sociability and participation in the community. Vellas also stated in his intervention that all these aspects that related to "delaying ageing" were scientifically supported by gerontology (Veloso, 2011).

The different dominant lines of thought in social gerontology have influenced not only the different analysis and studies on the older people, but they have also determined the creation of policies aimed at older people. This is seen in France in 1961, and in 1976 in Portugal, where third age policies in both countries advocated for the older adults to remain in their own homes (Veloso, 2011). However, this influence of gerontology can vary according to the area of study or intervention. Regarding this matter, Bond, Briggs and Coleman (1996) note that in the area of health and disease of older people, there have been prominent sociological philosophies such as structural-functionalist, symbolic interactionist, ethnomethodological and from a critical theoretical perspective.

In the particular case of older adult education, there are two main sociological perspectives to consider. From the analysis of different authors in educational gerontology (Glendenning, 1990, 2000; Withnall, 2000, 2002; Phillipson, 1999; Cusack, 2000; Formosa, 2002), it is possible to identify references to educational gerontology and critical educational gerontology. These two distinct theoretical approaches

have dominated different analysis and corroborated different practices. Educational gerontology has normally been associated to a functionalist perspective while critical gerontology has emerged from critical theory.

From 1940 to the 70s, the central questions of educational gerontology dealt with "issues related to 'adjustment', 'activity' and 'life satisfaction'" (Phillipson, 1999:120), largely addressed by activity theory and disengagement theory. Activity theory introduced the idea of "non-idleness" in the discourse regarding old age and called upon a new ethic for the Third Age (Guillemard, 1980). According to this idea every old person should be active in body and mind to avoid the decline associated with old age. As noted by Guillemard, these guiding principles for old age were broadly disseminated in France by the media as well as

> *... specific instances, such as the preparation cycles for retirement or the Universities of the Third Age, which, in the last few years, had a considerable role in the "schooling" of old age. Their expansion demonstrates well the intensity of the moralisation task aimed at old age (Guillemard, 1980:88).*

Taking into account the principles underpinning third age policies and the U3As, we agree with Aline Chamahian (2011) when she notes that the activities promoted by the U3As are intended for an audience that is relatively old and aimed at increasing the level of mental and physical fitness, foster sociability and improve the quality of life of older adults. However, the idea we would like to stress from this author is that in France the activities of the first U3As up to the 90s had medical, sociocultural and social goals (Chamahian, 2011). This was also the case in Portugal.

After the creation of the first University of the Third Age in Portugal, there was a very slow increase in the number of U3As. Between 1998 and 1999 I carried out the first survey of these universities, as part of a broader research related to PhD study. In this study (Veloso, 2001) 26 different U3As were recorded catering for 5,077 older adults. In the 90s alone, 18 new U3As were created.

One of the characteristics noted was that U3As were mainly an urban phenomenon with a higher concentration in coastal areas, especially in the north of the country where 50 per cent of the U3As were located. The detailed geographic distribution is as follows: North – 11; Centre 2; Greater Lisbon Area – 4; Algarve – 5 (Veloso, 2001, 2011).

The majority of the activities on offer were common to all U3As. The universities catered for a variety of disciplines ranging from a minimum of 10 to a maximum of 64 subjects on offer. The subject distribution was as follows: Languages - (most common) English, French, Portuguese; Social Sciences - History (common to all U3As), Local History, Art History and the History of Portugal. There were also several arts-based subjects as well as excursions, talks, seminars on a variety of topics and, in many cases, these were offered on a monthly basis (Veloso, 2001, 2011).

However, I also uncovered a distinct characteristic of the Portuguese U3As, when compared to their French counterparts: the fact that the majority of the Portuguese U3As were not-for-profit organisations (in the legal sense) with the exception of one cooperative and one institute (Veloso, 2001). According to several studies (Chamahian, 2009, 2011; Formosa, 2014), the French reality was different, as the U3As first emerged within tertiary institutions and this only changed from the 1990s onwards (Chamahian, 2009).

It is possible to conclude that the Portuguese third age policy promoted and advocated an active physical and mental lifestyle for older people, and was designed to keep them in their own homes. However, the policy was characterised by interventions in the welfare area, and the lack of a global third age policy did not promote education among older adults (Veloso, 2011; Veloso & Rocha, 2016). On the other hand, in terms of public policy aimed at adult education, my research identified that, up to the year 2000, the policy promoted schooling preferentially targeting a younger audience (Lima, 2001) and did not focus on the education of older adults (Veloso, 2011). The education of older adults was carried out by U3As that belonged to the third sector. Next I will analyse the U3A domain in the 21st century in terms of third age and adult education policies.

Senior universities and the education and training of older adults: Year 2000 to present

To frame the discussion on third age policies and the Universities of the Third Age in the 21st century, it is necessary to take into consideration demographic ageing and its impact on the economy. Concern with economic consequences of demographic ageing has been emphasised by several international organisations in the past few years.

The situation is worsening and the challenges posed to the economy and sustainability of the welfare and health systems are increasing in many countries. Different agencies such as the European Union, have set standards to monitor and/or mitigate the consequences of demographic ageing.

The Lisbon European Council of March 2000, also known as the Lisbon Strategy, put forward a central goal that would influence subsequent councils and affect interventions aligned to the older Portuguese population. The central goal was for European Union to become the most competitive and dynamic economy in the world, based on knowledge and sustainable economic growth, with better jobs and strong social cohesion. However, the European Union was faced with the serious problem of population ageing in achieving this goal and responded by putting forward, amongst other measures, its active ageing strategy (Veloso, 2011).

This way, in March 2001, the European Council in Stockholm proposed that people aged 55 years or older should remain longer in the workforce, so that by 2010 half of the population in the age bracket 55 to 64 years would remain at work. In addition to the measure drafted in Stockholm, the European Council of 2002 in Barcelona postponed the retirement age by five years up to 2010.

In Portugal, these EU directives and concerns on demographic ageing were also expressed through official documents advocating active ageing (Veloso, 2011). One such document is the Ministerial Act Number 137/2002, November, in which the National Plan for Employment for the year 2002 promulgated a policy consistent with active ageing. The document states the goal to be reached in the employment rate for the age bracket 55 to 65 years should be greater than 50 per cent, advocating that older workers should remain in the workforce and would be provided with access to education and training (Resolução do Conselho de Ministros n.º 137/2002).

Therefore, postponing the retirement age located older workers as the recipients of education and training programs that aimed at increasing their qualifications and employability. This need pressurised member states to invest in the learning of their older workers and became one of the five messages delivered in 2006 by the European Union in a communication entitled: Adult Education: it is never too late to learn.

In this communication the EU alluded to the fact that older workers should have better competencies and improved access to lifelong learning so that they could continue to participate in the workforce (Veloso, 2011).

However, within the same communication there is another challenge to the member states in terms of the education of adults. In addition to the need to invest in the learning of older workers, the states should also promote education (including tertiary education) to retired people because;

> *people are reaching retirement in better physical and mental health, and post-retirement life expectancy is extending. Learning should be an integral part of this new phase in their lives' (Commission of the European Communities, 2006:8).*

The Commission added that these efforts in education matters will allow 'retired people to be in touch with their social environment' (Commission of the European Communities, 2006:8).

In terms of third age policy, it is important to note that the policy in Portugal was developed mainly in the welfare and health areas, postponing access to retirement (Veloso, 2011; Veloso & Rocha, 2016); and a global third age policy that contemplated the education of older adults was still lacking.

In practical terms, the education of older adults in Portugal continued to be promoted by the U3As and not by means of public policies aimed at third age and/or adult education. From around 2000 onwards, adult education policy was centred on adults in the workforce and did not address the promotion of education associated with older adults (Veloso, 2011; Veloso & Rocha, 2016).

In 2005, a body that aimed to represent Universities of the Third Age in Portugal was created. The body was called RUTIS (Association Network of Universities of the Third Age or Associação Rede de Universidades da Terceira Idade in the original Portuguese) and was managed by a former leader of a retiree association who, curiously, was too young to be considered a senior himself (Veloso, 2013). The Association defined itself as a promoter of active ageing and as a representative, advocate and energiser of the Universities of the Third Age (Jacob, 2012). This concern with the promotion of active ageing earned RUTIS the official recognition of the Ministerial Council as a fundamental partner in

promoting active ageing policies. The Council also acknowledged that U3As carry out important work in the improvement of the living conditions of their student population, facilitating their inclusion and participation in society.

RUTIS has also coordinated different meetings and recreational activities between associates. However, the association does not limit its work in Portugal to these social activities and it also promotes research in areas such as active ageing and gerontology (Jacob, 2012).

Another important function of RUTIS is to provide information on the role and operation of U3As in Portugal. This includes providing information regarding the establishment of new U3As, which resulted in the reproduction of the goals and activities across different U3As. The role of RUTIS in assisting in the set-up of new U3As has also resulted in a significant increase in their numbers. Presently, there are in excess of 200 U3As, reaching over 35,000 retirees and older adults (Jacob *et. al.*, 2013).

Further to this increase in the number of U3As, there were also changes in the way they were run. It is interesting to note that in 1999 the U3As were mainly associations run by retirees. Presently (in 2017), these retirees run associations that represent only 30 per cent, as new promoters joined in. They include not-for-profit associations such as local and city councils, Rotary clubs and tertiary education institutions (Jacob, 2012:34-35).

This evolution, in numerical terms and in relation to the promotion of leadership models, is a contentious issue between the leaders of the different U3As. One of the leaders of a U3A from the group that emerged in the 1990's and is still controlled by older adults is an outspoken critic of the changes. He contends that U3As should continue to be run by older adults in an autonomous way, free from interference from third parties. Although the leader acknowledges to the benefits a RUTIS membership offers in terms of contact with other U3As, he does not agree to its loss of independence.

Another change that took place was the replacement of the designation Universities of the Third Age by Senior Universities, and by 2012 nearly all the universities were using this new nomenclature. Curiously, a name change also took place in France in the 90s. The new designations included names like 'Free Time Universities' or 'Universities for All

Ages', which reflected a change in the profile of the typical student to a younger person with higher levels of schooling, in search of cultural, scientific and physical activities that did not revolve around ageing (Chamahian, 2011).

Further to the changes in the U3As context in Portugal, there was also an emergence of training programs offered by tertiary institutions aimed at older adults. These tertiary institutions were offering a variety of senior training courses along with their own U3As. These organisations included two publicly funded universities as well as a private one; two public institutes as well as the Lisbon Science Academy. These tertiary organisations began catering for older adults for the first time in 2006 (Veloso, 2013). In some cases, the program on offer was a service provided by the university. In other instances, it involved a cultural extension or even a pedagogic unit of their respective organisations. Typically, a lecturer would be in charge of coordinating the project, the subjects would also be taught by lecturers and the classes would take place at the university where they worked (Veloso, 2013).

Some of the programs promoted by the Portuguese tertiary institutions offered certificates based on attendance and/or assessment if the older student conformed to the established rules. Some programs had entry prerequisites such as mandated minimum years of schooling, a bachelor degree or the provision of evidence of sufficient prior knowledge; whilst others required none.

The characteristics of these U3As or Senior Training Programs bear some similarities to the French U3As that were run by tertiary institutions. According to Chamahian (2011), these U3As were also led by university lecturers and the subjects were taught by professors at their respective university campuses. In other words, the U3As were integrated in the tertiary education world and were dependent on the traditional university model in terms of pedagogy, administration and geographic location on the university campus. However, from the 1990s onwards, there were some changes to the status of some U3As, which became associations. In some instances, however, administrative, financial and pedagogic cooperation agreements were put in place with the tertiary institutions that previously controlled these U3As (Chamahian, 2011).

The change in status allowed some retirees to assume teaching roles as well as leadership functions. Whilst in France this change took place long after the emergence of the first U3As, in Portugal the association model existed from the beginning (Veloso, 2011, 2013). However, the Association model of U3As in France and the loss of the tertiary education status may no longer cater to the expectations of younger retirees with higher qualifications who seek highly structured courses that allow them to gain further qualifications (Chamahian, 2011).

The availability of structured courses connected to tertiary education institutions, such as the senior training courses, are also starting to appeal to some retirees in Portugal. The interview with the above mentioned U3A leader is very revealing of this in this respect. When asked about the possible similarities between the two U3A models, he replied:

> *"In those 'universities' it is all different because they provide courses with diplomas and the older adults who seek them want to learn and progress academically and have a diploma. Here, at our university, the people who come here do not want a diploma. They also learn, but it is a pastime." (Interview with U3A leader)*

According to Ratsoy (2016), the education programs aimed at the older adults and promoted by tertiary institutions are often characterised by their hierarchical nature and higher costs when compared to education programs based on the peer-to-peer model. The peer-to-peer model programs are often self funded or financed through contributions of several agencies and universities, and the students carry out the work on a voluntary basis. According to both Formosa (2014) and Ratsoy (2016), the universities have a lot to benefit from older students as well as the partnerships they form with organisations for the older adults. The benefits are reciprocal and the organisations, educational and non-educational, benefit in turn from these collaborations, whilst remaining independent from tertiary institutions. In terms of the benefits for the universities, a variety of examples can be given of the collaboration of older adults with younger students in courses such as nursing and social work. In these cases, the older students play the role of clients, using of the services on offer (Formosa, 2014). The benefits for the older students are varied and also include free access to resources and facilities such as libraries and tuition support services, as well as low tuition fees (Formosa, 2014; Ratsoy, 2016).

Lastly, I believe it is pertinent to widen, even if briefly, the context of the Portuguese U3As in terms of the different models that exist around the world. Several studies, including the work of Formosa (2009, 2014) and Swindell and Thompson (1995) have identified a variety of different models of U3As. Among these, the Toulouse and British models have gained prominence. Whilst the Toulouse model is characterised by a dependence on tertiary institutions at different levels, the British model is substantially different, as its U3As do not depend on these institutions. Typically, the British model is based on a self-help approach with its members taking ownership of their respective organisations. In their operations, they are normally organised in small self-help groups with no distinction between lecturers and students.

In addition to these two models, Formosa (2009, 2014) notes other models that differentiate themselves from the previous two according to way they relate with tertiary institutions, how their members participate and the syllabus on offer. These include the culturally-hybrid model, the French-speaking North-American model, the South American model and the Chinese model. As the name suggests, the culturally-hybrid model shares elements from both the British and the French models. Formosa (2014) provides the U3As in Malta as an example of this model, where university lectures are complemented by group sessions run the members themselves. In the French-speaking North American model, the U3As are part of existing universities and the distinction between tertiary education and third age education tends to be blurred. An example of this model is the creation of the Bachelor degree of Arts at the U3A of Montreal, accepting either students with relevant background education or self-taught students with sufficient knowledge of English and French. Despite a connection and dependency on tertiary institutions akin to the French model, the U3As in the South American model are mainly concerned with older adults from underprivileged classes. Finally, the Chinese model is characterised for making use of paid lecturers, both young and old, as well as older adult volunteers. The syllabus is comprised of compulsory subjects such as health and fitness, as well as leisure courses including languages, philosophy and traditional crafts.

Taking into account all of the above, we can say that at least two different models of Third Age Universities coexist in Portugal. The first is similar to the French model and is representative of the education

programs aimed at the older adults that were offered by tertiary institutions from 2006 onwards.

The second that began in the 1970s, bears some resemblance to the British model since the U3As are independent from tertiary institutions and because they are promoted by private associations managed and operated by the older adults themselves. However, there is a difference that I consider to be significant: in the Portuguese model the roles of lecturers and students have always been distinct and well defined. Typically, the lecturers in the Portuguese U3As hold active teaching jobs, are former lecturers or teachers, or are older adults whose mastery and competency in a particular art or craft is readily acknowledged and recognised. In any case, the majority of the lecturers are volunteers (Veloso, 2011). Another differentiating characteristic of the Portuguese U3As is how they mimic elements of formal education despite their independence from teaching institutions. In particular, we note the adoption of practices such as formal lectures or lessons and the use of school calendars by the Portuguese U3As (Veloso, 2011). However, the number of Portuguese U3As managed the older adults themselves is decreasing (currently 30%) and this model seems to be in decline.

Regardless of model and in essence, the U3As and the existing senior training courses in Portugal promote educational activities that address so-called active ageing, providing new knowledge, development in different subject areas and access to different sociability networks that allow them to continue to participate in society.

Concluding remarks

Up to the 1990s, adult education in Portugal was the responsibility of the so-called third sector and was not part of the concerns of public policy, either in terms of third age or adult education (Veloso, 2011) and was formulated in terms of personal and cultural development (Chamahian, 2012).

From 2000 onwards, there is evidence of an emphasis in promotion the policy of active ageing both nationally and internationally. Within the European Union, this emphasis has taken a position that is closer to a vision of a more productive old age, where education and lifelong training are promoted for older adults, so that they can participate more actively in society, and be more competitive and employable in the workforce (Chamahian, 2012).

My paper identifies a progressive shift in the domain of education for older adults in Portugal, where different educational and training projects coexist, particularly within the domain of the so-called Senior Universities or Senior Education Programs, which meet the different expectations of a heterogeneous group of older adults. However, despite the variety on offer, there is plenty still to do, as Formosa (2014) advocates, to ensure all older adults can access education and training, including those who are also dependent and have mental and physical needs.

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Learning to live with chronic illness in later life: Empowering myself

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Type 2 Diabetes is both an incurable illness and a hidden disability that has reached epidemic proportions on a global scale. It has obviously spawned a huge clinical literature, but no scholarly accounts of learning to live with the illness on a daily basis from a feminist perspective. As an older woman, I have made use of a somewhat controversial autoethnographical approach to explore how far I consider myself empowered to live with, and manage this condition for the rest of my life. Self-management is an idea that is central to both the United Kingdom (UK) National Health Service (NHS) philosophy of supporting patient choice and within a feminist perspective on health care. Learning to identify, access and use the necessary resources to manage my condition suggests that there are regional differences within the UK as to how much practical care diabetes patients are offered or can access. The paternalistic nature of the health care team/patient relationship appears to militate against the concept of patient empowerment.

Keywords: *diabetes, autoethnography, feminism, learning, self-care, lifestyle.*

Introduction

As awareness of ageing populations grows across the world, enjoying a sense of physical and mental well-being by remaining active in society and retaining independence for as long as possible have come to be seen as desirable aims. Adult educators have been especially persuasive in emphasising the importance of continuing to learn throughout life as an essential ingredient of healthy ageing. Indeed, there is growing international evidence that learning in later life offers a whole range of benefits not only to individual learners as they age but also to their families, their communities and to the societies in which they live. Yet we know that for many people, the later years can bring varying degrees of ill health and the chances of growing older in good health vary greatly between countries. From a European perspective, it is fortunate that most people can generally still expect a good standard of health care in later life. Nevertheless, poor health in later life can be compounded by isolation or increasing poverty as well as by inequalities in accessing good quality health care.

What is surprising is that those involved in researching or facilitating later life learning rarely contemplate their own ageing or consider what it might mean to be forced to live with an illness or disability as they grow older. Yet as people approach their later years, some degree of change in well-being is inevitable. Understanding the nature of such changes is important in helping to cope with the challenges of daily life and with maintaining an acceptable lifestyle with age as well as enabling researchers to gain an insight into the lives of some of the older people with whom they work. As an older woman living in the United Kingdom (UK) who was diagnosed with Type 2 diabetes ten years ago, my aim in this paper is to explore and reflect upon my own experience of learning to live with this incurable illness over a decade using an autoethnographical approach. Have I empowered myself to live with this condition for the rest of my life and could my personal experience be meaningful for others? In this context, I understand empowerment as the ability to identify, access and make use of the resources necessary to take control of my illness, an idea that is central both to the UK's National Health Service (NHS) philosophy of supporting patient choice and within a feminist perspective on health care. My first aim is to offer a new and potentially valuable empirical resource since there are no scholarly accounts of learning to live with Type 2 diabetes from the perspective of

an older woman. A second aim is to question whether the health care that older women with Type 2 diabetes currently receive is appropriate; and thirdly, to consider the possibility of making changes that might make a difference to the lives of older women who are grappling daily with the practicalities of this stressful illness and their families.

What is Type 2 diabetes?

Type 2 diabetes is both a chronic illness and a hidden disability. It differs from Type 1, an autoimmune disease which is the result of the pancreas being unable to produce sufficient insulin, a hormone that regulates blood sugar (glucose) levels. In Type 2, some insulin is produced but the body is unable to use it effectively. Type 2 accounts for the majority of people with diabetes and usually affects people over the age of 40. Over a long period, since high blood sugar levels can damage tissues and organs of the body it is necessary to keep these levels under very tight control to prevent serious complications. Dealing daily with an incurable condition can also lead to depression and there is emerging evidence that diabetes is a risk factor for dementia (Strachan, Reynolds, Marioni & Price, 2011) as well as increasing the risk of premature death. The World Health Organisation (WHO) points to the economic impact diabetes can have, not only on the individual, but also on families and on health care systems through increased medical costs (World Health Organisation, 2016). It is also thought that one in two adults with Type 2 across the world are undiagnosed (International Diabetes Federation, 2015).

In the UK, there are an estimated 4.5 million people living with diabetes (around 25 per cent of these are probably undiagnosed) and 90 per cent of these have Type 2. Audits suggest that around 56 per cent of all adults with diabetes in the UK are men and 44 per cent are women. In England and Wales, the highest prevalence is seen in the 70-79-year age group (Diabetes UK, 2016). In Australia, diabetes is the greatest challenge facing the health system with around 1.7 million people affected overall; Type 2 is estimated to affect 85 per cent of these and numbers are growing (Diabetes Australia, 2015).

Increasing age, being overweight with an enlarged waist circumference, lack of exercise, having high blood pressure and a family history of diabetes are well-known risk factors and diabetes is more prevalent in people in certain ethnic groups. Although fewer women than men are affected by Type 2 diabetes, they are subject to some additional

risk factors and there are some differences in the way they experience the illness. There is also some evidence that complications are worse for women than for men due to a combination of factors but with differences in physiology likely to be involved (Gebel, 2011). I have therefore chosen here to focus particularly on women coping with Type 2 diabetes although I acknowledge that some of the issues I raise may be also applicable to men.

Methodology

Although still subject to some criticism, the use of autoethnography as a legitimate and useful form of qualitative inquiry has grown considerably in recent years spawning a considerable literature. It is an approach to research that systematically describes and analyses personal experience in order to connect that experience to the broader social, cultural and perhaps political context (Ettorre, 2016). There are diverse forms of autoethnography, one of which is writing a personal narrative (Ellis, Adams & Bouchner, 2011). In the context of illness, this can offer a therapeutic experience for the author even if it sometimes requires uncomfortable personal disclosure. It can also be a tacit invitation to the reader to enter the writer's world, to try to connect with his/her experiences and feelings (Méndez, 2013) and to reflect on the wider significance for their own lives. However, Chang (2016) is especially critical of descriptive illness self-narratives unless they also critically address wider issues as I will do here.

Another point that arises in writing an autoethnography is what Ellis (2007) calls relational ethics whereby researchers should critically reflect on their ethical responsibilities towards those who are involved in, or implicated in their research. In reflecting on my learning journey, I have not directly involved anyone who could be identified although I mention others with whom I have been in contact at some point or whose roles impinged upon and influenced my experiences in some way. Because it has not been possible to obtain informed consent or to check out my perceptions, I have ensured that no-one would have cause to be upset or angered by my interpretation of events even where I have been critical of some episodes in my journey.

Shortly after diagnosis, I kept a diary for a short time, recording symptoms, my reactions to treatment and my feelings as I adjusted to

a new identity as a diabetic. I have also re-examined my various test results over a ten-year period. I have participated in three very different but relevant educational courses concerned with chronic illness as well as two more informal local day events and recorded my observations and reactions to these learning experiences at the time. In addition, I have tried to keep myself informed through a considerable amount of reading around the subject, partly on-line but also through membership of the leading diabetes charity, Diabetes UK. Recently, I joined a local support group, which consists of people of all ages with both types of diabetes. Finally, I reflect critically on my experiences in relation to the care that older women with diabetes can expect in the UK.

A learning journey

Reactions to diagnosis

My story begins from the point when I received the diagnosis of Type 2 diabetes following an oral glucose tolerance test carried out by a doctor. My immediate reaction was a mixture of shock and a degree of relief that there was a genuine explanation for why I had been feeling vaguely unwell for several months. Yet inwardly, I was not altogether surprised since both my parents had been diabetic in later life. I therefore assumed there must be a strong genetic factor in my diagnosis but there was also a lingering sense of guilt that perhaps I had brought this on myself through an unsuitable diet and lack of exercise.

In the UK, all health care is free at the point of delivery in accordance with the principles of the NHS and people over 60 years of age are entitled to free prescriptions and medication. I was immediately prescribed an oral diabetes medicine that is used to help control blood sugar levels and additional medication to lower cholesterol and to treat high blood pressure. The only advice I was given at that point was to eat a balanced diet, to see an optician and to return in three months for a blood test. Later conversations with other women with diabetes confirmed that information at the point of diagnosis is often sparse, there is little opportunity to ask questions and the chances of referral to a dietician vary considerably according to location. At the time, I worked in a Medical School where some clinical colleagues had long-standing research interests in aspects of diabetes so I was fortunate in being able to ask informally for advice and to receive comforting reassurance.

Despite this support, the early months were a period of very difficult adjustment to my new identity as a diabetic. Apart from the need to remember to take medication several times a day, the emotions I experienced were akin to the stages of bereavement identified by Kübler-Ross (1970) as I came to terms with the loss of a previously healthy body. Shock gave way to denial. It surely must have been a misdiagnosis and I would shortly be told that it was all a mistake, apparently a very common reaction (Becker, 2015). Inwardly though, I knew it to be true and I found myself almost paralysed with fear as I read more about the dire consequences of failing to eat a healthy diet, exercising regularly and adhering to prescribed medicine as well as the possibility of premature death. This fear rapidly morphed into anger that this affliction had been visited on me. I felt resentful and cheated, a reaction I have since learnt is also quite normal both following a bereavement and on receiving a diagnosis of a serious illness. This was nevertheless a difficult and confusing period not helped by additional stresses at work combined with increasing family responsibilities.

Making changes

As identified in the 'stages' of bereavement, I eventually reached a point of calmer acceptance that life had changed for good and this was the beginning of being able to establish a degree of control. I recognised that I was at the start of a lifelong journey which would involve a degree of active planning and self-directed learning (Tough, 1971) although this is a multi-faceted notion. Through information leaflets produced by Diabetes UK, I learnt that, although the key to my care was self-management, I could expect support from a multi-disciplinary care team with me as the 'expert' patient. However, this is not a team 'sitting around a table discussing your case' (Becker, 2015:2759). These professionals rarely communicate directly with each other and it is the patient's task to contact them individually to undergo the recommended health checks at regular intervals. Although I always requested copies of my test results, some aspects of these were not always comprehensible to the lay person and health professionals rarely have time to explain them, a fact which militates against effective self-care.

All diabetics, whether Type 1 or 2, must make considerable lifestyle changes. For me, this was the most difficult aspect of control and involved some challenging experimentation over a long period.

Initially, since almost every type of food affects blood glucose in some way with carbohydrates the main culprit, an initial task was to learn more about the content of foodstuffs. For some time, I was almost afraid to eat anything but eventually, I settled on a diet based around an eating plan that involved only modest quantities of fat and cereal foods. Nevertheless, it was sometimes difficult to maintain such a diet especially when visiting friends for a meal; some of the optimum foods also tended to be expensive. At this point, I found the dietary advice provided on-line by Diabetes UK to be helpful.

The other key to self-management is to increase exercise levels although, like many older women, I had very little time and no idea what kind of exercise would be most beneficial. After I retired from full-time work, I discovered the GP (General Practitioner) Referral Programme which enables people with chronic illnesses in some areas of the UK to join a local gym and to be offered a 12-week course of exercise suitable for their individual level of fitness devised and monitored by a trained professional. Although this was not free, it was good for motivation and it encouraged me to join the gym after the programme was over. I also began to participate in an NHS-funded weekly health walk with a trained leader in charge. Such walks have been shown to be beneficial to participants in terms not just of maintenance of physical activity but also with respect to increased opportunity for regular social contact (Dawson, Boller, Foster & Hillsdon, 2006).

Non-formal educational programmes

Diabetes UK recommends that everyone newly diagnosed with diabetes should be offered the opportunity to attend an appropriate group diabetes education course but this was unavailable locally. However, I took part in a local Expert Patients course which is aimed at anyone who is learning to cope with a chronic illness. Again, the basic premise is that the patient is an expert on their condition and they can be trained to take the lead on managing this, thereby improving their health and quality of life. At the time, the programme was a central element of chronic disease management policy in the UK, enthusiastically promoted by the Department of Health as a new and cost-effective approach (Department of Health, 2001).

A free course, it was based on a programme pioneered in the USA with reference to work on social learning theory and was originally devised

for people living with arthritis (Expert Patients Programme Community Interest Company, 2007). It consisted of a weekly small group meeting over six consecutive weeks facilitated by two specially trained peer tutors. The course dealt with various aspects of daily living but there was also considerable emphasis on learning to set personal goals and developing problem-solving skills. There were equal numbers of men and women students, all retired, and it was clarified at the outset that the format would be small group discussion and group exercises. This did not sit well with some of the participants and a few did not return after the first week suggesting what Crowther (2000), writing from a critical theory perspective, terms an act of resistance to educational participation. Of those who did return, it was apparent that many of the women particularly struggled with the format, lacked confidence in speaking in public and were reluctant to discuss personal issues with strangers despite encouragement from the facilitators. Personally, although I initially found the course quite helpful as a tool for self-management, I did not retain what I had learnt for very long and, lacking further support, largely failed to put the ideas into practice in the long term.

What seemed to work better were two separate Saturday day courses specifically focusing on diabetes organised by the (former) local Primary Health Care Trust in conjunction with Diabetes UK. Free to attend, these courses were very informally run and consisted of short talks by health and exercise professionals on often neglected aspects of diabetes care such as choosing appropriate footwear. On both days, there was plenty of time for questions and some practical small group activities plus a helpful selection of written resources to take away as well as a healthy lunch. Most of the participants were older women and conversation about personal experiences of living with diabetes flowed much more freely than in the more formally structured course previously described. Sadly, such events are, in 2017, held less frequently, if at all, presumably due to severe cuts to NHS budgets. This is unfortunate since there is evidence from a Scandinavian study that diabetic patients who are encouraged to share their knowledge and experiences with facilitators in an atmosphere characterised by trust and good communication are more likely to understand that they can exercise a degree of control over their illness (Adolfsson, Starrin, Smide & Wikblad, 2008).

Later, I undertook a two-week MOOC (massive open on-line course) concerned with developing a patient-centred approach to diabetes

and attracting what appeared to be a huge range of participants from all over the world. There is now an emerging body of research on MOOCs generally and it is thought that across the globe, many thousands of older people take part in a range of courses on a variety of different platforms and in different languages. However, there is still a comparatively low level of research into understanding how older learners fare with such courses (Liyanagunawardena & Williams, 2016). Accordingly, although there was a very high level of reaction to the course material on-line it was not always clear how old participants were unless they chose to disclose this. Whilst women did seem much more comfortable with expressing their views here, MOOCs students need to be already competent and confident computer users and possess a good degree of literacy as well as a willingness to debate with strangers on-line. Some of the women participants stressed that they were undertaking the course on behalf of a spouse or male partner who had recently been diagnosed as diabetic. These women were keen to learn how to keep their partners in good health by overseeing their diets and accompanying them to check-ups. In this way, they may have become an important resource for their partner's own learning journey; or was there an underlying assumption that men are incapable of taking responsibility for their own health?

The study materials and the readings incorporated into the course seemed popular with participants but there were some areas of disagreement that led to considerable on-line debate. The first of these related to whether Type 2 diabetics should regularly test their glucose levels to establish which kinds of foods were affecting them. On-line debate about this issue was intense and combative in tone. The second area of controversy emerged in very heated discussion of recent research which suggested that Type 2 diabetes can be reversed (but not cured) through the adoption of a very restricted low carbohydrate high fat (LCHF) diet (Taylor, 2013). Many of the on-line participants testified to the efficacy of the diet but others questioned its validity since it contradicted much of the traditional dietary advice that has been dispensed by clinicians in recent years.

I recently undertook a second short MOOC concerned with living well with diabetes with the emphasis being on maintaining health and wellness from a holistic perspective. As before, participants came from all over the world and the sharing of stories about the challenges faced

and differing cultural expectations was a major feature and provided a key learning resource. Discussion here contrasted sharply with the forceful nature of debate experienced in the previous MOOC which I had found somewhat intimidating.

Reflective analysis

After ten years then, I have learnt that acceptance is an important part of empowerment in this context followed by an understanding that it is my responsibility to increase my knowledge of the effect of diabetes and to keep abreast of new developments through the identification of trustworthy sources of information. Having also benefited from discussions with a variety of other people with diabetes from all over the world and with health professionals both face-to-face and on-line, I have improved my ability to more confidently self-manage and to interact with, and sometimes challenge members of my care team. I will continue to update my knowledge and to learn from others' experiences as well as seeking to evaluate new advice. This is particularly important since my condition is likely to worsen with age.

In reflecting critically on my overall experience, it is worth noting that Greenhalgh (2009) in a critique of the ways in which the whole notion of illness self-management and the 'expert patient' has evolved, argues strongly that the evidence base for these models is weak. She advocates a more holistic or social ecology approach in which chronic illness is seen 'as arising from the interplay of influences within a complex system … acting dynamically through time' (Greenhalgh, 2009:630). Accordingly, she believes that there must be diversity of support provision and that local programmes should be organised more imaginatively to meet the very varied needs of different patients. However, the patient must remain an important member of the health care team since the process of agreeing on and implementing an appropriate care plan should be based on the negotiation of personal goals within the family, social, cultural and sometimes wider political context.

Greenhalgh (2009) makes an important and powerful case. But what can I extrapolate from my own story that will have relevance to the ways in which other older women can be helped to understand and to manage their illness? In the present UK climate where the NHS is subject to severe budgetary constraints it is an increasingly difficult task.

However, a feminist approach to health care emphasises the importance of education for women in relation to a chronic condition however this is provided. To receive a personal diagnosis is a shock and learning to self-manage an incurable illness can be a lengthy, bewildering and exhausting process. Female spouses/partners of male diabetic patients could also be better helped to understand the ways in which they could best provide support. However, it appears that there are some differences within the UK as to how much information, practical help and care newly diagnosed diabetics or their relatives are offered or can access and, because of increased demands on the NHS, on-going personal support is often minimal. The charity Diabetes UK is a useful point of departure, especially through its website, telephone helpline and local support groups, but not everyone is aware of its existence. It would be helpful if health care professionals both in the UK and elsewhere recommended it as a major resource for the newly diagnosed.

Another problem is the sometimes paternalistic nature of the health care team even when many team members are themselves female. Although the idea of a care team with the patient as the most important member with equal status is widely promoted, it appeared that the health professional-patient relationship still tends to be unbalanced. In informal discussions, several male patients also mentioned this. However, it was specifically some of the older women I encountered in the courses in which I participated who reported being reprimanded for failing to adhere to targets or having their concerns about possible side effects from their medication summarily dismissed rather than discussing and agreeing care plans as equals. In the UK, the NHS promotes various toolkits to enable health care professionals to enhance and develop skills and competences for diabetes care but it is important that these professionals understand that their attitudes can affect the quality of care they provide (Liu, Norman & While, 2012). Equally, older women need to learn that active involvement in their care and willingness to ask questions or to challenge decisions is similarly important. Since passivity and deference can lead to poor health outcomes, developing communication skills should be an educational priority for older women dealing with chronic illness. Briefly discussed in the Expert Patients course I attended, it might cover topics such as talking with health professionals, active listening, gaining the confidence to ask questions and clarifying answers (Expert Patients Programme Community Interest Company, 2007).

Following Greenhalgh's (2009) thinking, a further issue is the need for health professionals to acknowledge and understand the sheer diversity of older women's lifestyles. This is especially pertinent with respect to nutrition since making dietary changes is a major aspect of diabetes self-management. However, difficulties in learning what constitutes a suitable diet is often compounded by confusing dietary advice. Many older women live alone which can make menu planning, shopping and cooking a problem especially if they are infirm or living on a very restricted income. In addition, the food practices of minority ethnic populations may vary greatly by age, geographic origin and religion (Chowbey & Harrop, 2016). They may have certain distinct beliefs about food, ways of cooking and eating preferences that current advice about diet in diabetes fails to address. Carr (2012) advocates a series of study days to help health care professionals to understand what kinds of foods their diabetic patients eat and why. In this way, they would be better equipped to help older women learn more about how their condition is likely to be affected by the foods they eat. However, any such interventions would obviously need to be culturally sensitive and to take any language and communication problems into account. A Canadian study provided preliminary evidence that individual diabetes education counselling in conjunction with group education on nutrition adherence was effective in helping a group of Portuguese Canadians shape their eating behaviour (Gucciardi, DeMelo, Lee & Grace, 2007). In a similar way, it would be helpful if health professionals were trained to help older women choose and access appropriate exercise programmes since exercise plays such a crucial role in the control of Type 2 diabetes and related health complications. There is some clinical evidence that women may need different types of exercise regimes from men (American Heart Association, 2015).

In respect of the availability of specific educational programmes, it is probably unrealistic to expect older women to participate enthusiastically in a formally structured course if the format is likely to be unfamiliar or even threatening to them. More informal events with practical small group exercises and the availability of professional advice on coping on a day-to-day basis appeared to offer a more acceptable way of engaging older women and encouraging their participation. Additionally, the potential of MOOCs to offer short, focused courses that engage learners from all over the world who want to learn more

about diabetes and exchange experiences seems promising. However, emerging research has already established that such courses tend to have low completion rates and that the format may prove challenging (Department for Business, Innovation & Skills, 2013). If ways could be developed in which to clarify learner expectations and support on-line discussion more effectively (Ferguson, Coughlan, Herodotou & Scanlan, 2017), short, learner friendly MOOCs could be a useful form of engagement for those seeking support. As more women move into later life with well-developed computer skills, fears about on-line learning should slowly be overcome and it could provide a useful way forward in helping women (and men) to understand and cope with their condition.

Overall, the original work of Lave and Wenger (1991) and the ideas subsequently developed by Wenger (1998) suggest that female diabetics, however they are learning to manage their condition, can form a community of practice where they continually create and re-create their shared identity through becoming active in, and contributing to the practices of that community. This might be at a local level following a short educational course, through membership of a support group or on a global scale through participation in an appropriate MOOC. Since every woman dealing with Type 2 diabetes has an individual history, their shared expertise might offer a valuable networked resource for those newly diagnosed or struggling with self-management – a form of social capital.

Concluding remarks: The value of an autoethnographical approach

Presenting a personal narrative concerning my experience of learning how to manage a diagnosis of Type 2 diabetes has been beneficial to me in that I have been able to publicly and critically reflect on an aspect of my life that impinges on my identity as an older woman but which, like many other people, I have hitherto kept within the private sphere. Richards (2009) discusses the rendering of people living with illness as outside the norm and comments that often, they tend to write in a manner that simplifies and objectifies their experiences. As both the researcher and the focus of my own research, I have tried to avoid this trap by exploring some of the wider issues that my personal learning journey has revealed. However, constructing my story has raised further questions for me such as how I have chosen to present myself to the reader, what I may have unconsciously omitted from my account and the nature of memory (Muncey, 2010) that I will continue to explore.

An unexpected outcome of constructing my story has been that I have also begun to question how older women in some of the Asian and Western Pacific countries where diabetes has reached epidemic proportions cope with a diagnosis. For the many older women where poverty, lack of education and other social, cultural and economic barriers may prevent access to good quality health care, how might they also be empowered to take control of their illness? If we are to make progress in controlling this life threatening disease their stories also need to be heard.

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Occupational and educational biographies of older workers and their participation in further education in Germany[1]

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The adult cohort of the German National Educational Panel Study (NEPS) provides data from six sets of longitudinal data derived from 11,932 German adults. We used the NEPS data to look at the effects of formal education in adulthood and occupational changes on participation in further vocational education and training in order to gain a better understanding of learning activities of older workers. This data enables us to differentiate between upward mobility, downwards mobility and changes at the same level of occupation. In a multi-regression-analysis we control for well-documented predictors – such as level of schooling and vocational education, job status, gender and age as well as for company size. Descriptive results confirm the expected effects, but these effects disappear when the other variables are taken into account.

Keywords: *educational pathways, job changes, transitions, educational activities, gender.*

State of research

The participation of older workers in lifelong learning is not only a policy issue but becomes more and more a central challenge for human resource development (HRD) experts. For adult educators a deeper understanding of structures and motives of older workers educational activities is essential to address this target group properly. The participation of older workers in learning activities can be seen as a meaningful topic for the future, given that the number of older adults and the proportion of older adults in the workforce is expected to increase further.

For a long time research into factors predicting adult education participation has been discussed on the basis of cross-sectional data such as coming from adult education surveys. As recent analysis of the PIAAC data show, vocational experiences, job requirements, and job changes seem to have had an impact on educational activities (Schmidt-Hertha & Rees, 2015; Tikkanen & Nissinen, 2015). With respect to the meaning of transitions in learning and education (Cross, 1981; Schmidt-Hertha, 2017) and the learning requirements associated with a new job or position, the impact of job changes on learning activities seems plausible. Nevertheless, cross-sectional data cannot be indicative of causalities. Whilst longitudinal data have already been applied to learn more about the effects and benefits of adult education, they have been applied less for predicting participation (Schuller, Preston, Hammond, Brassett-Grundy & Bynner, 2004).

Against the background of demographic changes and a rapidly increasing percentage of 'elderly' amongst staff, the low rate of participation in vocational further education amongst older workers has become the subject of debates in science, politics, and business. While political programs aim at increasing participation in further education among older workers (e.g. WeGebAU – a German initiative for encouraging further education for lower-skilled and underemployed staff), human resource (HR) managers lament the lack of willingness among older members of staff to learn or to participate in education (Schmidt, 2011). Scientific studies, however, show that, on the one hand, individual returns from vocational further education depend on age and on average decrease with age (e.g. regarding job security, promotion, or higher income (Lang, 2012; Beicht, Krekel & Walden, 2006)). On the

other hand, there are clear indications that a stronger differentiation among older workers is necessary and that other influencing factors are of relevance that superimpose themselves on age (such as educational qualifications (Thieme, Brusch & Büsch, 2015; Schmidt, 2007)), just as deficits in the offering structures seem to be a cause for age differences in participation in further education (Zwick, 2011; 2012). In summary, many findings suggest that it is not so much biological age, but rather the job situation and the overall living conditions that function as primary predictors for participation in further education (Schmidt, 2009; Schmidt-Hertha & Rees, 2015). Against this background, the question arises as to how far participation in further education among older workers is also determined by the learning requirements with which they are confronted in the workplace or by their experiences in the course of their educational and vocational biography.

One of the best substantiated empirical findings in research on further education is the so-called 'Matthew effect', that is the strong correlation between participation in further education and formal education (Bilger, Gnahs, Hartmann & Kuper, 2013). A distinctly greater probability of participation in further education among individuals with higher general educational and vocational qualifications is evident for diverse subgroups – including older workers (Büchel & Pannenberg, 2004; Schmidt, 2009). Until now, however, formal qualifications were only differentiated according to quality and not taking account on the point in time at which they were acquired. Thus, it is still unclear about the extent to which the use of opportunities offered by second- and third-chance education (pathways to higher education for adults with no or only a low level of formal education) is successful and of significance to older adult's future willingness to partake in further education. Qualitative data on older workers are suggestive that such late educational experiences may be of special relevance to the future educational behavior (Schmidt, 2009).

With regard to workplace conditions, mental stress at the workplace, the required level of performance in completing work tasks (Thieme, Brusch & Büsch, 2015), as well as the qualifications required by the job (Schmidt-Hertha and Rees, 2015; Tikkanen/Nissinen, 2015) have proved to be significant predictors of participation in further education amongst older workers. Furthermore, company size (Schmidt, 2009), sector (Cordes & Haaren, 2015), and the company´s age structure and

qualification structure (Bellmann, Dummert & Leber, 2013) are relevant factors influencing participation in vocational further education. As yet, very little research has been carried out regarding the impact of a change of job or of employer on participation in vocational further education. On the one hand, it can be assumed that a change in job will be accompanied by additional learning requirements and thus by more incentives for participating in further education activities. On the other hand, such career changes can be of varying quality (for example involving promotion versus change on the same level, one-time versus frequent change of workplace) and accordingly may be perceived by the parties concerned as more or less significant and of higher or lower relevance to learning. Nevertheless educational processes can help prepare and even enable career changes, which is why the chronological sequence of participation in further education and career changes is of special significance in interpreting the interrelations of these factors.

On the basis of data from the cohort of adults studied by the National Educational Panel (NEPS), the effects of career changes on participation in further education can be investigated longitudinally, because the survey has already systematically covered not only educational activities, but also career episodes over a period of more than eight years. Central research questions of this paper are related to the meaning of educational and occupational transitions for participation in vocational further education. Does formal education as a second- or third-chance education in adulthood effect current educational behavior? Do occupational changes (changing job and/or employer) have an influence on participation in vocational further education?

The National Educational Panel Study

The National Educational Panel Study (NEPS) investigates educational processes and competence development from early childhood up to late adulthood throughout Germany. NEPS started in 2009 as a temporary research project at the Otto Friedrich University Bamberg, funded by the Federal Ministry of Education and Research, and was integrated into the newly founded Leibniz Institute for Educational Trajectories (LlfBi) in 2014, thus consolidating it. A central aspect of the investigation of educational processes in the National Educational Panel Study is the differentiation of five comprehensive analytic dimensions, the so-called 'pillars':

Pillar 1: Competence development across the life course

Pillar 2: Education processes in life-course-specific learning environments

Pillar 3: Social inequality and educational decisions across the life course

Pillar 4: Education acquisition of persons with migration background

Pillar 5: Returns to education across the life course.

These content-related pillars are integrated across the lifespan, which is divided into eight educational phases by the National Educational Panel:

Phase 1: Newborns and early childhood education

Phase 2: From kindergarten to elementary school

Phase 3: From elementary school to lower secondary school

Phase 4: From lower to upper secondary school

Phase 5: Upper Gymnasium (secondary) level and transition to higher education, vocational training or the labour market

Phase 6: From vocational training to the labour market

Phase 7: From higher education to the labour market

Phase 8: Adult education and lifelong learning.

In a multi-cohort sequence design more than 60,000 target persons and 40,000 context persons (e.g. parents, teachers) were included from six starting cohorts ranging from early childhood to adulthood, all of whom were selected and first interviewed in the years 2009 to 2012. The cohort of adults (starting from cohort 6) is composed of adults being interviewed for the first time as well as adults being interviewed repeatedly, because some of the individuals interviewed in the precursor study 'Working and learning in change' (ALWA) carried out in 2007/2008 were transferred to the first wave of the

NEPS. The population of this starting cohort 6 consists of adults aged between 23 and 64 years (at the time of the first interview), living in private households in Germany, who have mostly finished their initial training. The NEPS is designed as a panel according to which each of the target persons are contacted about every 12 months and asked for a repeat interview. Every second survey year, competence assessments are planned which are carried out via oral computer-assisted personal interviews (CAPI). In waves without competence assessments, interviews via telephone (CATI) were preferred whenever possible. All of the interviews were computer-assisted (Bäumer *et al.*, 2012; Blossfeld, Rossbach & von Maurice, 2011).

Data sets and methods

The following analyses are based on the fifth wave of starting cohort 6, comprising adults interviewed in 2012/13 in the course of the National Educational Panel Study (NEPS). The current sample comprised 11,696 individuals born between 1944 and 1986. Since in the following analyses, we only include older employed adults (50+ years), the sample was reduced to 5,208 individuals. Participation in further education by these individuals implies that they participated in at least one class or course of studies during the past twelve months, with the focus on non-formal further education in particular. Non-formal further education is here defines as all forms on vocational and non-vocational further education which are organized as courses, e-learnings or lectures but do not lead to diplomas which are recognized by the state. Further education is differentiated according to the reasons given for participating that is for either work-related and/or private interests. This line of inquiry, however, was only carried out for two of the courses the interviewees attended, at most, so that data on differentiated further education participation among the interviewees are limited. Participation in further education among adults older than 50 years for work-related reasons amounts to 27.9 per cent, 6.3 per cent participated for private reasons, and 5.3 per cent for private and work-related reasons. The latter cohort will in the following be associated with vocational and general further education. Figure 1 shows participation by employed individuals in vocational and general further education according to age group.

Figure 1: *Participation of employed individuals in vocational and general further education in percent according to age*
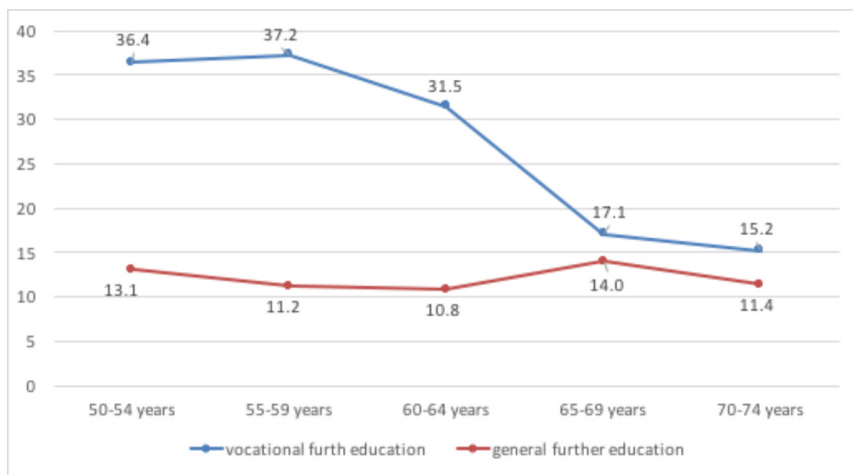

The analysis was undertaken through logistic regression (Backhaus, Erichson, Plinke & Weiber, 2011), with participation in vocational further education being the variable to be explained. In addition to the education and employment biography variables that need to be investigated, the predictors included gender, age, socio-economic status (via International Socio-Economic Index (ISEI)), level of education measured by the last achieved ISCED (International Standard Classification of Education) level, as well as company size, all of which contribute significantly to the explained variation.

The impact of educational biography on current education behavior[2]

A variable presenting the number of educational transitions in the level of formal education is of crucial significance for our research question. Date related to these changes has been collected in the first wave retrospectively, when people have been asked to report formal education activities. We aggregated the data on formal education during the life course to one variable representing the number of changes in levels of education (based on CASMIN and/or ISCED classification). The first change usually represents the first school certificate while the second change in most cases represents the first vocational training or higher

education certificate. If there are three or more changes documented, we start from the assumption that this stands for second or third chance education. This indicator in the following is called 'number of educational transitions'.

Figure 2: *Participation in vocational further education among workers according to the number of educational transitions*
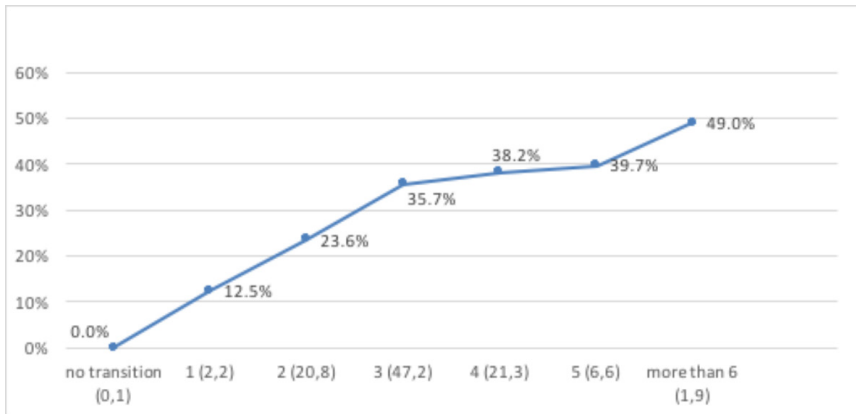
The descriptive analyses of the number of transitions initially confirms the assumption that formal qualifications that were acquired at a later point in time might have a positive impact on willingness to participate in further education. At the same time they point to the erosion of the normal course of life in which such transitions are only to be expected twice, that is after the first general qualification and after vocational qualification (see Figure 2).

The results of the logistic regression model on participation in vocational further education among workers older than 50 are documented in Table 1. The influence of the variable 'number of educational transitions' as well as that of the predictors shown to be of empirical relevance are shown as odds ratio (effect coefficient Exp(B)). This value specifies the prospect of participating in further education in relation to the reference category. In view of the subject of investigation and the complexity of the data set, a pseudo-R^2-value of 0.115 points to a respectable explained variation. However the interrelations expected

were only partially confirmed. Although the explanatory contribution by higher formal qualifications obtained after completing school or initial vocational training (recorded here via changes in the achieved ISCED and/or CASMIN (Comparative Analysis of Social Mobility in Industrial Nations) level) is not statistically significant, it still proves important as a control variable in so far as the weights of the other variables taken into account by the model are shifted. Rather conspicuous are the considerable gender-related differences, which seem to come even more to the fore once other variables are controlled for. Whereas, from a purely descriptive point of view, participation in further education among female and male workers hardly differs (Leven, Bilger, Strauß & Hartmann, 2013), female workers older than 50 can be shown to be much more active regarding further education than male workers of the same age group once social status, educational background, company size, and formal educational activities during adulthood are controlled for. Thus, the women in that older age group have a 1.5 times higher chance of participating in vocational further education than the men in that group. Also conspicuous is the fact that, although company size does not prove to be of significance as a linear predictor, it noticeably increases the proportion of explained variance of the complete model.

Table 1: *Logistic regression of the number of educational transitions taking into account other predictors regarding participation in vocational further education*

	B	Standard error	Wald	Sig.	Exp(B)
Age	-0.060	0.017	12.165	.000**	0.941
ISEI-08	0.010	0.005	4.520	.033*	1.010
Size of company	0.060	0.032	3.502	.061	1.062
Number of educational transitions	0.073	0.111	0.437	.509	1.076
Gender (RC: men)	0.436	0.187	5.461	.019*	1.547
ISCED	0.101	0.044	5.240	.022*	1.106

Pseudo-R^2: ,115; *p<0,05; **p<0,01

The impact of occupational biography on education behavior

The impact of occupational biography on workers' participation in vocational further education was also investigated. Particular focus is placed on the effects on changes in the workplace over the life course. With regard to the significance of transitions for education and learning (in this context, see Cross, 1981) and to the requirements regarding learning that accompany a change to a new workplace or a new position, the impact of occupational change on learning seems plausible. On the one hand, the number of occupational transitions can be taken into account; on the other hand, the type of change can be looked at. Participation in vocational further education in relation to the number of occupational transitions over the life course (ranging from zero to more than nine transitions) hardly differs from that observed in relation to the number of educational transitions (see Table 2). The expected effect of occupational changes on activities in vocational further education cannot be verified in the descriptive analysis.

Table 2: *Workers´ participation in vocational further education in relation to the number of occupational transitions*

Number of occupational changes	Proportion of sample (%)	Participation in vocational further education and training (%)
0	5.3	32.9
1	13.3	33.2
2	15.4	32.3
3	17.1	35.7
4	14.5	33.2
5	10.7	37.3
6	8.0	33.0
7	5.3	36.2
8	3.7	31.3
9	2.2	34.5
>9	4.3	25.2

As for the quality of occupational transitions, the groups are differentiated according to 'no transition', 'transition on the same level', 'transition to a lower level', and 'transition to a higher level'. This differentiation was undertaken on the basis of the respective ISEI level of the initial employment and of the current employment. In this case, too, we are dealing with a retrospective description. During the initial and the current employment other changes in the ISEI-08 may occur that are not taken into consideration here.

Table 3: *Workers´ participation in vocational further education in relation to the quality of the occupational transition*

	Proportion of sample (%)	Participation rate (%)
No occupational transition	5.6	32.5
Transition to the same level	21.5	39.8
Transition to a lower level	30.0	27.0
Transition to a higher level	42.9	36.8

On the one hand, the descriptive analyses show that a minority of workers remain in one and the same workplace over their life course; rather, their occupational biography includes several occupational transitions. This is also made clear by the number of changes in jobs, with most of the interviewees reporting three occupational transitions (Table 2). However, data don't provide any information on whether these transitions have been self-initiated or imposed. With regard to the quality of the occupational transitions, the largest group is that which shows a higher ISEI value than the one they had at the time of their first employment after having reached the age of 50 (see Table 3). On the other hand, those groups featuring transitions to the same or higher level show a more pronounced willingness to participate in further education than those groups with no transitions or transitions to a lower level. Thus, in this context, the descriptive results confirm the assumption that transitions in occupational biographies, especially those accompanied by higher learning requirements (transitions at the same or to a higher level), have a positive impact on participation in further education.

Table 4: *Logistic regression of the quality of occupational transitions with regard to participation in vocational further education*

	B	Standard error	Wald	Sig.	Exp(B)
Occupational transition (RC: no transition)					
Transition to the same level	0.293	0.150	3.846	.050	1.341
Transition to lower level	-0.247	0.148	2.801	.094	0.050*
Transition to higher level	0.204	0.143	2.046	.153	1.226
Age	-0.043	0.006	44.381	000**	0.958
Gender (RC: men)	0.216	0.064	11.426	.001**	1.241

Pseudo-R^2 = .034 *p<0,05; **p<0,01

With a pseudo-R^2 value of .034, the explained variance is rather moderate in this context. The occupational transitions over the life course prove to be of significance to participation in further education for only one group. Compared to the group of older workers who stayed in the same workplace throughout their life course, older workers who changed workplaces and whose current employment is of the same status as their first employment have a 1.3 times higher prospect of participating in vocational and further education, even if gender and age are controlled for (see Table 4). Only once the other predictors – educational background, social status, and company size – are controlled for as well, occupational transitions are no longer significant (see Table 5). However, in this case too, a shift in the variables taken into account emphasizes the significance of occupational transitions as a control variable.

Table 5: *Logistic regression of the quality of occupational transitions taking into account other predictors regarding participation in vocational further education*

	B	Standard error	Wald	Sig.	Exp(B)
Occupational transition (RC: no transition)					
Transition to lower level	-0.035	0.294	0.014	.904	0.965
Transition to higher level	0.092	0.283	0.106	.744	1.097
Age	-0.057	0.018	10.588	.001**	0.944
Gender (RC: men)	0.449	0.191	5.553	.018*	1.568
ISCED	0.110	0.044	6.395	.011*	1.117
ISEI-08	0.010	0.006	3.044	.081	1.010
Size of company	0.062	0.033	3.615	.057	1.064

Pseudo-R^2 = .112 *p<0,05; **p<0,01

Discussion

The findings do not confirm the expected relevance of changes in the level of formal education and occupational transitions for further education activities amongst older workers. Schmidt (2009) suggests that the successful organization and tackling of biographical upheavals through educational activities – including at later stages in life – entails a high degree of openness regarding offers of further education. As far as the NEPS data are concerned, this effect is initially reflected only on the descriptive level, but appears to be explained above all by other socio-demographic factors. Although the underlying attitudinal patterns and motives for participating in further education cannot be taken into account here, the operationalization of formal educational as well as occupational transitions in the course of adulthood carried out in the investigation at least showed the differences revealed on a bivariate basis to be spurious effects. However, the data indicate that experiences with formal education and occupational transitions interact with other variables; the importance of this finding would have to be ascertained through further analyses. The fact that attitudes towards

learning and education may still change, even in late adulthood, justifies carrying out further studies focusing more closely on the impact of second- and third-chance education on further education behavior. Special emphasis should be placed on examining the chronology of further education activities and occupational transitions throughout the occupational career. The short-term effects of occupational changes on further education behaviour are also the main focus of a current study on further education behaviour among older workers (Schmidt-Hertha, Rees & Kuwan, 2015).

The findings are also of relevance to an investigation of further education behavior among older workers insofar as they show that, even when taking into account other predictors, age in itself provides an independent explanation for participation in further education. According to the present data, biographical age still affects participation in further education, even if educational background, educational biography, and socio-economic status are taken into consideration. This is consistent with a picture frequently conveyed by descriptive statistics, namely that participation in further education decreases after the age of 50. At the same time, the results of the study are in contrast with those of other studies warning against an overestimation of biographical age and pointing to the importance of experiences accumulated in the course of the educational and occupational biography and of the current job situation (Aust & Schröder, 2006; Schmidt, 2007). Against this background, it can be assumed that the relation between age and participation in education will be even further relativized once additional variables on the current job situation and on requirements at the workplace are taken into consideration, as is possible on the basis of the PIAAC data (Schmidt-Hertha & Rees, 2015).

Finally, the distinct effect of gender raises questions that need to be investigated in further studies and through other data. As yet no explanation has been given as to why, if all the above mentioned factors are controlled for, the probability of participation in further education is far higher for older female workers than it is for male workers of the same age.

Conclusion

Theoretical models clearly indicate a relevant impact of life transitions on adult education activities (Cross, 1981), and there is also some evidence for that (Tikkanen & Nissinen, 2015; Schmidt, 2009). The paper has been

looking at two forms of transitions in adulthood: educational transitions (here defined as changes in educational levels, consequently related to formal education) and occupational changes (operationalized as changing the job and/or the employer). For both kinds of transitions no significant effect could be found on participation in vocational further education of older workers. One central reason for that might be that we did not control for the timing of these transitions and thus transitions – whether educational or occupational – are treated the same no matter if they had happened last year or decades ago.

Findings indicate the relevance of age and gender when it comes to participation in vocational further education. While the effect of age is also visible – or even might be overestimated – in descriptive statistics, gender effects only become visible if other variables are controlled for. There seem to be concurrent effects in particular for gender, occupational status, age, and socio-economic background. The results show that women in the same age and position and with the same socio-economic background are more likely to participate in vocational further education than men. However, women – in particular the cohorts we have been looking at – are disadvantaged on the labor market and consequently also economically disadvantaged in many ways. Thus, public statistics show a lower participation rate among women than among men, but this is due to these disadvantages and not to a lower interest in vocational further education.

Endnotes

1   "This paper uses data from the National Educational Panel Study (NEPS): Starting Cohort Adults, HYPERLINK "http://dx.doi.org/10.5157/NEPS:SC6:8.0.0"doi:10.5157/NEPS:SC6:8.0.0. From 2008 to 2013, NEPS data was collected as part of the Framework Program for the Promotion of Empirical Educational Research funded by the German Federal Ministry of Education and Research (BMBF). As of 2014, NEPS is carried out by the Leibniz Institute for Educational Trajectories (LIfBi) at the University of Bamberg in cooperation with a nationwide network."

2   Some of the following passages have been published in a journal: Schmidt-Hertha/Müller 2016

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Mā te ora ka mōhio / 'Through life there is learning'

Brian Findsen, Barry Golding, Sabina Jelenc Krašovec & Bernhard Schmidt-Hertha

In our final paper we reflectively stand back and ask, 'What do we know and what have we learnt about lifelong learning in later life from the international Getting of Wisdom Exchange program and process, including the research papers in this volume? In critically addressing this question we draw not only on new insights from the papers in this themed volume and the wider literature of lifelong and later life learning, but also on insights from Indigenous knowledge(s). We sense an ideal opportunity to reflect on our insights into Indigenous learning and eldership in Australia and New Zealand to go beyond what research is actually included in this volume. In part, what we do is ask what voices, pedagogies and research tends not to be included here, that is also missing in most mainstream Western research, that typically seeks universal 'truths' about learning through peer reviewed scientific perspectives and methods. We certainly do not regard learning shaped and re-shaped by governments through neoliberal and conservative discourses as the only or last word. We have chosen the ancient te reo Māori words, Mā te ora ka mōhio / 'Through life there is learning' as the title for our paper to emphasise that lifelong learning is an ancient and wise construct that regards life and learning as inseparable and mutually reinforcing.

Keywords: *lifelong learning, later life learning, wisdom, Indigenous knowledge, eldership.*

Introduction

The intention of our final, joint paper is to ask, 'What have we learnt and can conclude internationally from the Getting of Wisdom (GOW) Exchange about lifelong learning in later life?' While we make reference to parts of the collaboratively developed, final 'Exchange Statement' in italicised text and cited as GOW (2017) throughout this paper, we also draw on methodologies, findings and insights from all of the papers in this volume as well as the wider and related international research literature. We point to several of many lacunae: we pay attention to what is missing in this volume and the wider body of research about learning across the life-course that has informed our thinking. Formosa (2014:14-15) points to three such lacunae in current European lifelong learning policies, retaining original italics.

> *First, a neo-liberal construction of later life where 'public issues' are projected as 'private troubles'. … Second, constraining productive ageing solely to the sphere of paid employment. … And finally, policies' exclusion of older persons located in the fourth age.*

To these we add a fourth and fifth lacunae that we are keen to make visible in this volume: that there is *a dearth of research that accounts for the important role eldership plays in intergenerational and family learning, especially for Indigenous peoples.* Finally, as Burke and Jackson (2007:215) put it, there is *too little research into the practices at play within formal learning institutions [that] create a barrier to the recognition and valuing of learning that takes place outside of formal contexts.*

The eleven papers in this volume are truly antipodean, originating from a total of fifteen researchers in six European countries in the geographic North, as well as from Australia and New Zealand in the geographic South. While several later life learning contexts chosen for study are social and informal, including through community Men's Sheds, knitting circles and through informal learning in other community settings, others focus on more organised or formal later life learning:

through University of the Third Age (U3A), work, adult and community education, vocational education and training as well as university. What is common to most papers is that they draw mainly on and analyse the experience of older learners as co-participants in a social activity or in a community setting. The data and insights have typically been collected from participants either through case study, program evaluation, interview or survey, ethnography or auto-ethnography.

One common theme that runs through many of the papers is that lifelong learning is not only empowering and transformational by meeting the diverse and sometimes different personal, social and well-being needs of older adults, but also enables people to give back to the community and to society across generations. While the Polish paper in this same volume features just one case study of an older Polish migrant in Sweden, the paper's conclusion that ageing is part of the process of forming and transforming identities that are re/constructed through lifelong and life-wide learning is a significant, common theme.

As researchers in later life learning we take several collective value positions about knowledge and power, first articulated in Western thought as 'knowledge is power' (*scientia potestas est*) by Francis Bacon in 1597, and most recently reworked by Michel Foucault as a comprehensive poststructuralist critique of the humanist subject. For Foucault, lifelong learning would bring a new technology of power and a mechanism to control operating in society to make it function smoothly - *omnes et singulatim*, resolving the individual and the society (Olssen, 2006). Freedom and participation are connected; learning is exercised through problem solving, and the '... individual participates and contributes to the collective good of society and in the process constitutes their own development' (Olssen, 2006:225). Olssen cites Foucault's opinion (Foucault, in Olssen, 2006) that the creation and development of knowledge embraces unbelievable power, equivalent to physical power. Knowledge is not a cognitive abstraction but a social practice, meant to reinforce action and participation. But power and knowledge are mostly in hands of a minority, whose understandings, through language and speech, are imposed on the majority. When children learn to speak, they accept the underpinning knowledge and culture of the society in which they live. Foucault's comprehensions are very important for adult education, because they increase awareness of marginalization and stereotyping in society and help with the insight,

that organized education is a part of institutionalisation and decision-making. Hemphill (2001) quoting Foucault, considers that education can be either empowering or disempowering, sometimes even both. All forms of organization of knowledge are the result of power relations (Hemphill, 2001:26-27). Yet the practice of adult education shows that power relations (for example, setting goals, planning programs, ways of teaching) are among the most influential factors for retaining social inequalities and injustice. However few theoreticians and practitioners in the field of adult education critically assess the influences of education on re-establishing power relations in society, or the influences of power relations on educational practice. Critical theories of education, oriented to social structures, emphasise the differences between individually oriented theories in the field of adult education and more critically based social theories.

As authors we believe in lifelong learning, not because of an objective, universal 'truth' that applies in the same way in all settings and contexts, but because collectively *believing* in the power of learning through life enables us to do new things: to transform identities, to cooperate and communicate effectively regardless of age, culture and place, and to forge better societies. As such, learning is integrally related to community; participation and learning are by their very nature social. The learner is a part of a process of action '... for change as part of a dialogic encounter rather than as a consequence of individual choice' (Olssen 2006:225). Such learning is connected to democracy through deliberation and contestation, participation and engagement, through which learning becomes a constitutive democratic project.

It is important that we also collectively acknowledge and reflect on the increasingly important contribution of the deep, wise and ancient learning cultures of both Aboriginal and Māori societies to contemporary lifelong learning in Australia and New Zealand respectively, and we would argue also to Western discourses about education and learning. Many world nations have similarly important Indigenous peoples but their voices and wisdom are often missing and seldom heard or reflected in mainstream debates in research and literature about lifelong learning. As an example, whilst Aspin, Chapman, Evans and Bagnall's (2012) *Second international handbook of lifelong learning* seeks in its 45 chapters to undertake a critical re-appraisal of the theme of 'lifelong learning', its contributors and

contributions are almost totally silent about the nature and importance of Indigenous lifelong learning.

Jared Diamond, in his transdisciplinary *Guns germs and steel* (1997:17), described Australia as being '... the last continent to be occupied by Europeans. Until then, it had supported the most distinctive human societies, and the least numerous human population, of any continent.' With more than 250 separate Indigenous Australian nations and languages across a continent that the colonising British conveniently regarded as 'empty' through the legal figment of *terra nullius* ('no-one's land') in 1770 - less than 250 years ago, there is much Indigenous knowledge and wisdom that has been lost but also much to learn from and regain. While New Zealand was somewhat more fortunate in at least securing a treaty in 1840 as British sovereignty was declared over Aotearoa, elders in both modern nations are fighting contemporary resistance struggles to reclaim Indigenous learning, language, land and knowledge.

It is in these two still contested, neo-colonial contexts that we gathered for the Getting of Wisdom Exchange at '... *a relatively pessimistic and arguably unenlightened time in terms of global equity and justice*' (GOW, 2017). Many contemporary issues such as widening social inequality, however, are not new, but are persistent and becoming even more obvious. Mayo (2003:42) affirmed fifteen years ago that then current societies were characterised by a:

> ... *scenario of mass impoverishment in various parts of the world caused by the ruthless dismantling of social programs, the ever widening gap between North and South ... the constant rape of the earth ... for profit, besides the persistence of structures of oppression in terms of class, gender, race, ethnicity, sexuality and ability.*

In the context of the GOW Exchange, we regard age as one of many factors causing societies to be divided and split. Older people are not always regarded as an equally important part of their communities, being able to or even being invited to influence decision-making. Many groups of adults are socially, culturally or economically deprived (and/or experience such deprivation), most often because of shared characteristics that deviate from dominant and desired social characteristics in space and time. Deviating characteristics are mostly

the result of different life manners, cultural praxis, ethnicity, gender, age and social class, but they could also be a result of different gender orientations or beliefs. These characteristics are mostly accompanied by poverty, unemployment, lower levels of formal education, language difficulties, lack of information and lack of access to informational technology. Older people, and particularly Indigenous people, could be and often are in this group. Importantly, each of these characteristics including age is more a symptom of active marginalisation and disempowerment rather than deficit.

Our intention in this GOW series of conferences and accompanying dialogue was:

> *... to share research, to discuss and develop ideas, share evidence and inspirational stories of older adults learning and identify spaces and places for encouraging and celebrating the wider value of learning. (GOW, 2017)*

The Getting of Wisdom statement (GOW, 2017) cited throughout this paper was developed and agreed on through a process of collective writing and editing involving email and document exchange between all participants post the Exchange events. A series of drafts led to the final statement and recommendations being formally approved in April 2017 by both Adult Learning Australia and ACE Aotearoa as both the main Exchange sponsors, and the national adult education peak bodies in Australia and New Zealand respectively.

Lifelong learning versus lifelong education – a way to deal with conference issues

Since antiquity onward adult education has been aimed at intellectual, spiritual, ethical and aesthetic development of the individual and an understanding of the social essence. Education has often been linked to social movements, founding and retaining social justice and the development of communities. Adult education often followed socially critical and radical ideas for increasing equality amongst people, especially marginalised social groups who could use the newly acquired knowledge to obtain greater power and influence (Jelenc Krašovec, 2012:84). Today, adult education is too often understood narrowly as a key economic good for ensuring prosperity of a country or nation. However within the context of the GOW conferences in 2017, we saw

this as a problem. We contend that in Western countries a critical discourse is necessary to speak back to the prevailing neoliberal project. Due to these neoliberal influences, educational policies are more in favour of strengthening the economic power of the state, and less in favour of preserving education as a public good, or as a factor essential to the maintenance of a democratic welfare state (Olssen, Codd & O'Neill, 2004; Olssen, 2006; Hega & Hokenmaier, 2002). With a widespread disintegration of community values and an increasing emphasis on individualism, we are currently diminishing the enlightening influence of not only general adult education, but also the quality and dignity of human existence, equality and justice.

Our GOW discussions dealt with the idea of lifelong learning (LLL), which appeared over a century ago in Western intellectual traditions. We identify three broad generations of the LLL concept (Jelenc Krašovec, 2012:86; Rubenson, 2006:329). The first generation fits broadly into the 1970s, and was denoted by the humanist tradition and an optimistic orientation; educating for a civil society was important as were the endeavours for an improved quality of life and smaller educational, social and economic differences between people. The second generation of LLL appeared because of economic, mainly human capital, imperatives during the 1980s, when an increase in unemployment, lower production and other factors placed the OECD states in a more insecure position in relation to the rest of the world. The discussions about LLL thus took on political and economic dimensions, for through learning there was a view that individuals could and would adjust to the society and to the changes that were taking place. An important milestone in the development and fulfilment of the LLL idea was represented by the 1996 OECD report: *Lifelong learning for all* (OECD, 1996), which in retrospect represented a shift away from humanism and idealism in adult education and the beginning of the neoliberal period (Illeris, 2004:29). At this point at a political level, the LLL concept was less about humanistic and idealistic concepts, for example informal adult education, lifewide learning, enlightenment of the people and active citizenship, and more about international competitiveness for those in paid work.

In the *'third LLL generation'* (Rubenson 2006:329), learning processes became subject to a reduction in the use of government sources and a simultaneous introduction of vast structural reforms aimed at improving

the conditions for lifelong learning as defined by the free market, which consequentially lead to a neglect of social and individual problems. Ever greater socio-economic differences, exclusion and marginalisation became evident; this is a period in which (in part because of intense criticisms) the economic aspects started to soften slightly and various political documents started to include the social aspects and not merely 'human capital'. As stated in numerous documents adopted under the European Community and OECD (such as the Lisbon strategy and the Memorandum on lifelong learning), LLL is defined as the key strategy for achieving a knowledge-based society (or market economy). In the third generation the individual was seen as largely responsible for his/her own education. Rubenson (2006:328) calls these changes 'the colonialization of the adult education field', in which the LLL concept caused the decline of the welfare state by reconstructing citizenship as the individual's responsibility for economic development (Rubenson, 2004: 29-31).

However, education is perceived as a private and public good, thus also a social obligation. As a private good it is a market good (the interest is money, position and personal growth), while as a public good it has a number of dimensions – it develops a moral, ethical, social, cultural and political awareness of all citizens, and at the same time adds to the efficient performance of democratic processes (Olssen, Codd & O'Neill, 2004:148). The needs of individuals and social needs often differ one from another, however they come the closest at the level of community. Community education, which has had a long tradition in developed countries, is especially exposed in to cuts in funding during tight economic situations, despite their positive influences and buffering effects during periods of social and economic change, including on quality of life, personal growth, improved interpersonal relations and solidarity. Establishing and preserving a fertile public sphere remains the central task of civil community adult education. Part of this task, we argue, will involve reviving the importance of communities that encourages diversity in values, norms and institutions, promotes informal learning and strengthens the civil society. We regard older adults as being in an ideal situation to lead rather than follow in this revival.

Looking at later life learning through the perspective of the Getting of Wisdom Exchange, it is evident that despite learning in later life constituting a relatively new field of research from a Western perspective, the origins, traditions and practices of lifelong learning

go back much earlier, being evident and still present in life and many communities throughout the world, particularly in many Indigenous cultures where lifelong learning was intergenerational and essential for survival. Again and again we saw and heard during the GOW Exchange that learning and life are inseparable in a wide range of Indigenous and national contexts for people of any age; that learning is not all about work, but that it is lifelong (across all ages) and lifewide (across all domains of life). We argue on this basis that a starting approach to learning generally, and to later life learning in particular, should as much or more be about empowering and enabling seniors in diverse social and community contexts and much less (or sometimes nothing to do) with standardized curriculum and formal teaching.

Our main Conference focus was associated with lifelong learning derived from a progressive and humanistic tradition of adult education (Knowles, 1984), which can be traced to the early 1970s (particularly the work of Illich, Lengrad, Freire and the UNESCO report *Learning to be* (Schugurensky & Myers, 2003). This tradition, which re-emerged during 1990s, emphasised expressive forms of learning/education without losing sight of instrumental and vocational aspects of life. While for some, this tradition individualises collective political movements, promotes competition and excludes marginalized groups, for others it has a liberating and transformative potential (*ibid.*). To have a transformative potential, it should be an inclusive, holistic and critical learning project. Elliot (2000, in Schugurensky & Myers, 2003) argues that such a project has a great potential to encourage critical awareness, political skills and civic participation in formal institutions and in informal settings, encouraging social movements and political activism). Similarly, Aspin and Chapman (2000, in *ibid.*) define lifelong learning as a public good for the benefit and welfare of everyone in society.

As being a part of the Getting of Wisdom Exchange, we agree with a revival of this age-old tradition, and see lifelong learning in a wider and deeper way, as a socially active public good for all.

Learning through later life

Given all of the above, it would be unwise and naïve of us to conclude about the nature and availability of later life learning and research internationally just on the basis of the papers in this volume or on our collective experience as researchers. Findsen and Formosa

(2016:509) noted that even the diversity of later life learning across the 50 independent states in Europe defies any simple categorisation. Extrapolating from the 42 national older adult education case studies documented in Findsen and Formosa's recent international book to all 195 world nations is impossible. While we acknowledge that older adults globally experience diverse material and political conditions, and that their heterogeneity makes it problematic to make too many generalizations (Findsen, 2005), we do know that the proportion of older adults in the world population is increasing rapidly and the proportions of seniors who experience poverty, limited autonomy and very few prospects for positive engagement in worthwhile learning are expanding too.

We return to Jarvis (2001) in his relatively early and perceptive book, *Learning in later life*. Jarvis noted that:

> *We all learn from our experiences and these occur in social situations; other people are part of the process of creating these experiences in interaction with the learner ... Those who work with older adults should understand the intentional, and more significantly the unintentional learning that occurs as a result of their interactions with them.* (p.14)

Almost two decades ago when Jarvis penned these words, many of the 'more traditional forms of non-vocational adult education' (Jarvis, 2001:5) as well as general adult education, and particularly the 'more radical formulations of adult education' (*ibid.*), had already become marginalized in late adulthood. Population aging since in almost all nations of the world has created an increasingly ageing demographic of adults beyond paid work. And yet, as Jarvis succinctly put it, 'We all have to learn to be free in a world that lies beyond work' (*ibid.*:74), learning to develop 'new identities after retirement - both personal and social' (*ibid.*:75). And yet the language we continue use to describe these processes, including retirement, is antiquated and unhelpful. As a very recently formally 'retired' professor put it in one of her keynote presentations during the Exchange, 'I have spent much of my working life tired and I am not seeking to be re-tired afterwards'.

While developments in older adulthood, as in any other part of the life course, are inevitably influenced by globalization and neo-liberal contexts in many countries, this trend is counter-acted by attention

within societies to make strong claims for local distinctiveness and autonomy, typically exhibited in informal learning spaces.

We also acknowledged that:

> *The two nations hosting the European exchange (Australia and New Zealand/Aotearoa) have only relatively recently begun to acknowledge, celebrate and learn from their rich, diverse and vibrant Indigenous and European ways of being and knowing after centuries of very recent and often painful colonization. These elements of Indigenous Eldership formed important strands in the Exchange program. All events deliberately included, embedded and actively involved local, community and Indigenous people, knowledge and places. (GOW, 2017)*

Yet the marginalisation of Indigenous peoples, particularly their elders in a neo-liberal world, is persistent. The United Nations estimates that there are over 370 million Indigenous people living in over 70 countries worldwide (WHO, 2007). Whilst this equates to just six per cent of the total world population it includes at least 5,000 distinct peoples, many of whose people and elders have effectively become refugees in and beyond their own lands. It is possible to assert that within all world nations, oppressed and marginalised groups (Freire, 1984), including Indigenous peoples across much of Africa, Asia, Oceania and the America are more likely than 'mainstream' peoples to be disenfranchised from formal education.

It is easy to forget that many of the same issues of colonisation and cultural and linguistic hegemony continue to impact not only within most countries across Africa, Asia, the Middle East and Latin America but also within many 'modern' nation states included in this volume, including Ireland, the UK, Sweden, Aotearoa / New Zealand and Australia. By looking at older adult education beyond the 'usual' Western nations, Findsen and Formosa (2016) found widespread evidence internationally of the ascendancy of Western views leading to widespread subjugation of local and Indigenous knowledge(s). In most world nations revival and intergenerational appreciation of both Indigenous knowledge and national culture depends heavily on the wisdom and knowledge of elders. In essence, as many papers in this volume suggest, we have much to learn as researchers from listening and attending to the knowledge(s) and wisdom of Elders, particularly

how, where and what knowhow older people already have.

Conference agreement

As a result of our deliberations on the evidence and insights, Exchange participants produced and agreed on the following Conference Agreement:

- We walk in the steps of our ancestors and Elders whilst plotting new learning landscapes.

- We call on governments to invest more in lifelong and lifewide learning opportunities for older people. These learning opportunities would help people stay connected to others: keep minds, bodies and spirits active; and provide younger generations with an opportunity to learn from older generations.

- It is time to use research evidence to highlight the benefits of learning in later life.

- There is a pressing need to counter the relative invisibility of older people in lifelong learning initiatives and to influence the state, particularly around issues pertaining to later life learning and education. (GOW, 2017)

These assertions are not to be interpreted as unique to our deliberations but were certainly accentuated in dialogue. Many of the proclamations about "active ageing" and "successful adjustment" to achieve a fulfilling life, already abundant in emergent literature, were reinforced as significant drivers for later life satisfaction.

Getting of Wisdom participants concurred that now is a critically important time to:

- acknowledge the increasingly important role of governments in facilitating, funding, supporting and resourcing later life learning/education, including beyond paid work, and

- build recognition of evidence for the huge value of learning in later life to individuals, families, communities, society and democracy. (GOW, 2017)

Participants were in unanimous agreement that:

1. *Older adults generally have the capacity and interest to learn new things and to develop their skills and competencies. Central to this yearning is their need to engage in useful, productive, and social activities that contribute to their communities and to their social environment. Consequentially, learning opportunities should be combined with productive and socially embedded activities that offer older adults multiple opportunities to develop and share their existing interests, abilities, skills and wisdom.*

2. *Older adults have an immense amount of life experience at their command and must be recognized and valued as conveyors of knowledge and as a resource of wisdom and eldership. Elders are not only the bearers of traditional values, cultural knowledge and contemporary witnesses of historical events. They are also experienced problem-solvers, in many cases endowed with rich social skills, and usually very willing to contribute to the societies and communities in which they live. Therefore, we recommend cherishing and valuing their knowledge and capabilities by opening up new possibilities for them to share their abilities, both with their peers and inter-generationally in their communities and societies. (GOW, 2017)*

We identified:

> *... a need to challenge and change[1] attitudes to later life learning, which have been based on an outdated model that has sidelined older people's need for learning once they leave the workforce. We conclude that with widespread population ageing worldwide, this model requires radical and urgent overhaul.*

> *For many older people there is evidence of both a desire and necessity to continue paid employment for longer and to freely share their wisdom and skills inter-generationally and often informally. This, we argue, calls for a profound reassessment of attitudes to later life and the phase of 'decline' and 'older adult education'. Moreover, we acknowledge that an increasing vitality of people in later life is often coupled with a desire for mental engagement in further learning, education and voluntary contributions to society. (GOW, 2017)*

Exchange participants identified three principal challenges for older people on their final statement (noting that several of these challenges have previously been teased out in Cooper, Field, Goswami, Jenkins & Sahakian, 2010:33). In particular:

- *learning to remain as independent and as well as possible in diverse contexts at any age.*

- *tapping into and acknowledging the wisdom of Elders and their ancestors.*

- *sharing and acquiring knowledge, skills and wisdom inter-generationally. (GOW, 2017)*

Participants finally agreed upon an assertion of rights and benefits, consistent with the notion articulated in Findsen (2005:140) '... *that learning by older adults is an essential element of living and that educational provision should be justified as a basic human right. Age should have nothing to do with one's access to education'* (GOW, 2017). There was also agreement about the need for a wider recognition of inter-generational learning '... *as part of a fuller range of opportunities for (older) adults'* (GOW, 2017) consistent with international research findings on older adult education from 42 world nations/regions documented in Findsen and Formosa (2016) and researched in Europe by Schmidt-Hertha, Jelenc Krašovec and Formosa (2014).

The following Getting of Wisdom statements point to further serious considerations of most societies across the globe:

1. *We assert that older people have the right to self-determination, which includes the right to opportunities for adult learning and community education. The right to self-determination underpins the right to health and wellbeing that celebrates the value, dignity and significant contributions of older people to the life of the community. In solidarity with all generations, older people have a rightful place in the heart of community life. Learning at all ages and stages improves relationships between generations and makes societies more cohesive.*

2. *As ageing connects past, present and the future and is a lifelong process, we assert that ageing encounters and reflects the life-course of the individual and the social context. Today's youth will be tomorrow's adults and elders, which reminds us to appreciate*

that many different aspects of learning are important for the development of the individual and communities. Enlightenment, learning and education of all generations are crucial for our common future.

3. *Research evidence confirms that older people who continue to learn, formally or informally are more independent, socially connected and confident. We assert that later life learning helps people remain productive in the community and the workforce, improves health and wellbeing, and reduces social isolation and loneliness. (GOW, 2017)*

Conclusion

We conclude that the three conferences and associated field trips and sustained debate across the two host countries as part of the GOW Exchange form part of the broader need to continue challenging taken-for-granted assumptions about the capabilities of older members of our societies. The visitors from Europe provided rich additional insights not attainable from "down-under" perspectives alone. In our final Conference statement we argued that

> *Learning about our physical, intellectual and social interconnectedness is becoming increasingly relevant internationally in view of global demographic trends, such as global warming and nuclear proliferation.*

> *We are growing short of patience for the reluctance of governments to take heed of population restructuring and the concomitant need to invest in and learn from older generations for the betterment of whole nations. There is too much unfinished business for anyone to be complacent about the urgency required for resolution of issues in later life that can be addressed by informed adult educators and supporters.*

To conclude our article, aside from making statements, we made what we regard as four important normative recommendations (GOW, 2017):

1. *It would be timely and beneficial for national governments to formally investigate and make recommendations about acknowledging and encouraging later life learning through*

research, policy and practice. We acknowledge diversity within older age groups and a wide variety of different learning and gender groups. Accordingly, we recommend more research into the use of different methods, sources, contexts and approaches to older adult learning.

2. *While we continue to advocate for lifelong learning (where informal learning is acknowledged as important), we recommend that this does not absolve the state from providing opportunities for learning/education for later life in more diverse and accessible ways. In particular, marginalised sub-populations of older people including people with disabilities in the Fourth Age (of dependency) and from diverse linguistic cultural backgrounds should be given higher priority.*

3. *Wherever there are First Nations people, we recommend that nations have a responsibility to ensure maintenance and intergenerational transmission of eldership and knowledge, particularly by traditional and First Nation owners and Elders as ongoing custodians of their nations, lands, languages and cultures.*

4. *We recommend further financial and logistical support for research that focuses on older adults and intergenerational learning at a national and international level. Cooperation in such research at a global level will allow efficient sharing and synthesis of insights and perspectives from researchers in diverse contexts. (GOW, 2017)*

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Book Review

The Paula principle: How and why women work below their level of competence

Tom Schuller (2017)
London: Scribe 256pp
| ISBN: 9781911344018 | e-book ISBN: 9781925548013

Reviewed by Annette Foley & Peter Lavender

Why educational success does not always lead to equality

> *Anna[i], 42, from Melbourne, believes a lack of self-confidence stopped her from being promoted in the media and advertising worlds. "I used to watch this guy at work," she says. "He wasn't competent but he was the most extraordinary self-promoter I've ever seen. It made me realise how I needed to put myself forward more."[1]*

This familiar story from the *The Sydney Morning Herald* in June 2017 appears in a discussion of why women, successfully educated and competent in every way, so frequently end up in a job that doesn't reflect their ability. It's one of the questions Tom Schuller asks in *The Paula Principle: How and why Women Work Below Their Level of Competence*[2]. The stories Schuller uncovers about women's experience of the workplace is underpinned by a wealth of data from

OECD countries in which it is clear that women have overtaken men educationally at every level and yet somehow this isn't matched by success in employment. For example, Schuller reminds us that women have overtaken men,

- at school leaving certificate level

- at top of course in the High School Certificate in Australia

- at university entrance level

- at attendance in full-time further and higher education

- at highest level in university finals

- in medical school exams...

and he calls these *'crossover points'* and teases us as to when they happened – longer ago than you think, is the answer. The data used is rich, accessible and simply set out. It is probably something we all knew, but didn't know quite as clearly as we do now. The inescapable conclusion is that something very odd is going on. Or, if you're a woman it's probably pretty obvious and endlessly irritating. Despite Schuller's disclaimer in the preface that he is not a gender specialist nor is he a woman, there is a level of irony about a privileged white male, commenting on the rather obvious issue that faces women in the workplace. Although this is oddly uncomfortable, Schuller himself recognises this irony in the early part of the book.

Schuller's concept of 'The Paula Principle' is accessible and useful for adult educators and the principle is set out as, *'most women work below their level of competence'*[3]. In this book Schuller doesn't explore in any depth Feminist theories on domestic, reproductive labour and the relationship between capitalist production and domestic reproduction[4] nor does he carry forward alternative visions of gendered patterns. The book is deliberately written in a way that is accessible to a broad audience and does away with academic language. Schuller has been working on this idea for many years and supports the data with valuable interviews with a range of women, and underpinned with a useful blog. His theory is that there is a common pattern to what is a frustrating problem. He identifies five broad reasons why there's a gap between achievement and workplace position for women in OECD countries which he terms 'factors'. He suggests a useful exercise where people

might vote on which factor is most important in explaining the Paula Principle and suggests an order of perceived importance. Might it be structural, about discrimination and the way in which women are undervalued? Might it be the result of caring responsibilities – children, partner or elders? Might it be related to women's self-confidence or identity? Perhaps it's about social capital and lack of access to vertical networks? A fifth suggestion from Schuller is more positive – it's the result of choice - the wish to balance one's life and not to expose oneself to such high stress. All of these are explored; none in themselves are convincing as a cause, but in combination they may go some way to explain an ongoing and as yet unresolved problem. The best answers as to why the Paula Principle is evident lie in the responses from those he interviewed. Their view of the world – across the social class spectrum – leaves us by turns angry and exasperated.

Evidence of the Paula Principle is all around us. In July 2017 the BBC in the UK published the salaries of all staff earning over £150,000. It provided opportunities for the first time to note that male colleagues doing the same job in the same teams (like newsreaders) were paid, hugely different salaries from the women – with the men always earning a great deal more. Only a third of the top salaries went to women in spite of an equal pay policy going back years. The men themselves came blinking into the light at this exposure, agreeing rather sheepishly with interviewers that yes the gender pay gap was wrong and shouldn't be happening: men and women should get equal pay for an equal job. But hapless executives in the BBC, trying to explain how this could have happened, could not answer very simple questions like, 'If there is an equal pay act in this country and in your corporation, how come you allow this to go on?' Nor could they offer any solution, other than by saying that salaries for those top earners would become level in due time (about three to ten years). "We need to employ the very best. They help make the BBC what it is. That's the business we're in," the Director General Tony Hall said. "And of course, we're in a market that is now even more competitive than ever…'[5] One interviewer asked, *'Couldn't the men take less money?'* There was no answer from Hall to this suggestion.

Tom Schuller's book is very useful for continuing the debate. It raises questions which may make some people feel uncomfortable, but provides a valuable prompt for research students looking at widening

participation. It reminds us (as always) that education might make a huge difference to individuals but in itself education cannot be the one and only key to securing equality in a real sense. This makes it harder to sell lifelong learning to policy makers but at least it's placed the argument in the public domain. It doesn't explain why pay is still unequal, or so few women are in boardrooms or running big national and international companies, but it does explain the many reasons that might contribute to this. The Paula Principle seems to apply across many job levels and types.

Schuller argues deftly that there may be a number of solutions to unlock whatever it is that is holding women back. There is nothing inevitable about the Paula Principle and part of the solution lies in men valuing 'mosaic working'; greater clarity about how we see part-time working and how it is valued; greater access to learning throughout life.

You will find this book of value, in seminars, at the dinner table and in trade union meetings. We recommend giving it to colleagues and students and asking for their experiences and the reasons for the Principle, and what they suggest the solutions might be. We need to carry on the conversation about it – and it has to be bigger than the equality argument – while being essentially about equality in the end.

Two irritating things in an otherwise excellent book: first, the absence of an index so that you can find things easily, and second, the references. To follow up a reference requires scampering to the back of the book, which in turn means you lose the drift or argument. I understand that the publisher wanted an accessible book and not one written in the usual academic jargon. It is useful that the book is accessible but references and index would have been helpful. This is a relatively trivial complaint. The Paula Principle is a book worth reading for everyone who wants to see fair play and has a passion for lifelong learning and adult education.

About the Reviewers

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Endnotes

i   Names have been changed.

1   Dent, J. (2017) 'What's holding so many well-educated women back when it comes to work?' *The Sydney Morning Herald Careers and Money*, June 11, 2017.

2   Schuller, T. (2017) *The Paula Principle: How and why Women Work Below Their Level of Competence,* London: Scribe RRP £14.99 | 234 x 153mm pbo, 256pp | ISBN: 9781911344018 | e-book ISBN: 9781925548013.

3   Contrasting with Peter and Hull's (1969) *The Peter Principle: 'Every employee tends to rise to his level of incompetence'.*

4   Weeks, K. (20017) *Life within and against work, ethemera articles: Theory and politics in organization*, Vol 7, 1: 233-247.

5   'BBC expects backlash over stars' salaries but says they're worth it' Tuesday 18 July 2017 <https://www.theguardian.com/media/2017/jul/18/bbc-expects-backlash-stars-salaries-says-theyre-worth-it-tony-hall accessed 08 August 2017>.

Book Review

Distress in the city: Racism, fundamentalism and a democratic education

Linden West, (2016)
Trentham Books, UCL Institute of Education Press, London: 192pp.
ISBN: 978-1-85856-688-7; ISBN: 978-1-85856-689-4 (e-book)

Reviewed by Tony Brown

This century we are witness to a series of political tremors and occasional earthquakes, though the fissures have been widening for some time. First the Global Financial Crisis led to the deep austerity imposed on Greece, Spain and Italy and the appointment of EU administrators over the heads of elected governments in those countries. Modern electoral expectations were then turned on their head with the UK Brexit vote, and quickly followed by the wave of support for Bernie Sanders, and ultimately in the shock of Donald Trump's Presidential victory. More recently the tremors have continued with the out-of-nowhere French Presidential victory of Emmanuel Macron, the surge of support for Jeremy Corbyn's UK Labour Party, and now the election of nearly 100 members of Germany's far-right, anti-immigrant party (AfD) to the Reichstag. Most analysts were taken by surprise and struggled hard to explain this phenomenon.

Like others I was more than just surprised, I was disoriented by Trump's election. On the other hand though, the evidence of the large and growing disparities in wealth, the spread of precariousness to many aspects of daily life affecting more and more people, their disaffection with politics and sense of alienation has been around for some time. Whether it be serious academic research (such as Wilkinson & Pickett, 2009, Dorling, 2010, 2014 or Piketty, 2014) or the more popularly pitched exposes of Thomas Frank (2016) the devastating impact of growing inequality has been there to see and therefore we shouldn't be so surprised upon reflection.

Generally however these works have been grand in scale providing historic perspective and national sweeps. This is where Linden West's book differs. *Distress in the City* takes its starting point in one midlands English city, Stoke-on-Trent, and through a close examination gives insight to the daily and immediate impact on this multi-cultural city.

Stoke was well known as the home of English pottery with its world famous Spode and Wedgewood factories. There was also coal-mining, iron and steel production and related industries but they have been largely shut down and the city now relies on service industries and as a distribution centre. Where once 100,000 were employed in the Potteries by 2009 the number was down to 9,000 and on some estates unemployment reached 50 per cent. Twenty percent of the population have limiting long-term illness and mental disease is rife. Instead of being a mildly prosperous city Stoke, Britain's 12th largest city, suffered the despair and fracturing evident in many post-industrial cities. In this environment racism and fundamentalism have had 'stronger purchase', and the Labour Party, which had traditionally held such sway in local politics lost touch and then support, such that the neo-Nazi British National Party (BNP) won seats on the city council in 2009. Stoke is West's home town.

Coupled with this social and economic fragmentation was a decline in adult education provision. The independent self-help tradition that had been such a strength of British workers education and organisation withered as the WEA and the Wedgewood Memorial College were forced to close, and the City and County Councils cut funding as they opened public provision to private providers, as education for a narrowly conceived labour market was prioritised above other areas such as citizenship education.

The book has four sections. The first three chapters present a case study of Stoke-on-Trent, enabling the reader to understand its scope and see it as an example of other English post-industrial cities. I particularly enjoyed Chapter 4 where West sets out a rationale for using Auto/biographical narrative research, and its functionality. It's a convincing argument for 'understanding lives from the inside' and one that will be beneficial to research students in observing how a research methodology rationale is articulated. In this case he is arguing that auto/biographical narrative research has the power to illuminate in a way that data-rich and data-driven epidemiological studies don't quite capture. The data collected for this work is taken from interviews with fifty residents conducted over a three-year period.

Chapters 5-8 present four examples of life in Stoke and the interconnection of education and learning. In these chapters we hear the voices of white working class residents and their experiences of 'the State withdrawing from the(ir) estate'; members of the predominantly Muslim South Asian local population and their experience of fundamentalism within the community; and participants in local adult and workers' education centres as a means of understanding the importance it has played in personal transformation through 'evoking fundamental questions of who a person felt themselves to be, and who they might become'. In this regard West identifies it as an 'experiment in democratic education', which leads into Chapter 9 where he draws on the experiences of two autodidacts and introduces Raymond Williams' concept of 'resources of hope'. For examples of the life-expanding potential of adult education the stories of Nancy Dobrin (pp.104-5) and Red Mick the retired miner (pp.110-121) are inspiring and give life to the key notion of learning a 'democratic sensibility'.

The final three chapters address Raymond Williams' concept of 'resources of hope' with examples of how they might be understood and implemented today.

Three concerns weave through the book. The rise of a range of fundamentalisms – a term whose origins lie with nineteenth century Protestantism and the inerrancy of the Bible – but now manifesting in racism and a linked Islamophobia and Islamism. With the state of democracy – participation in, engagement with, alienation from, cynicism towards – especially among the poor and marginalised and

those living with the stresses of unemployment, social fragmentation, mental disease or a combination of them. And what might be needed for an education that is a 'perpetual learning of democracy', one that encompasses the idea of an active citizenry.

At its heart the book is radical. Radical in the sense of proposing a different way of approaching education and research, not just in its critique of 'marketopia' but more importantly in its reiteration of the need for reflection, that is, taking time to analyse, think and construct (historic) imagination. It is a call to listen and talk with others, for researchers to immerse themselves in recordings and transcripts to allow themes to emerge, and to generate stories. And radical in its effort to bring together psychoanalytic and sociocultural explanations into an inter-discipliniary imagination; and to foreground absences in analyses such as emotion and the neglect of working class experience.

West often 'strays' into the self-reflective – of his actions and views from his earlier years – when he first physically and then emotionally distanced himself from his own working class background, and his father, to attend university in the 1960s, leading to his dismissive, and snobbish, attitude to workers education and of his tendency to seek 'narrative truth' and a type of fundamentalism. In this his writing reveals a pain in its truthfulness.

What distinguishes this book for me, and infuses it, is the focus on an approach to an adult - democratic - education that has receded but is needed now more than ever. In discussing the education that was available in Stoke through the WEA, local adult education and other self-help centres, the Labour Party and through the work of R H Tawney and Raymond Williams he outlines a constructivist view of knowledge. 'Their classes were classes, not lectures, and ideas were explored and developed in discussion. The processes were democratic … ' (p.107). Williams described his teaching being for 'an educated democracy, not a newly mobile and varied elite' and hence his methods were dialogical. West argues that Tawney and Williams 'shared a pedagogic faith in ordinary people and the importance of open enquiry, cultivating curiosity and challenging received wisdom' (p.132).

Of course this can all sound like adult educator cliché. Except that it isn't, and it isn't easy. There is much doffing the cap to critical inquiry, to Freire, to dialogic education, but too often the temptation to 'tell' rather

to listen, and to lead to the correct answer, wins out. This is particularly the case in situations where important issues are at stake, among NGOs, campaigning and activist groups, parties and unions. The courage to resist telling and have confidence in adults to explore, inquire and learn is a constant challenge. Perhaps the demise of the structured education of adult educators has contributed to this.

The challenge is big. West observes the city of his youth and witnesses a fragmented society created by successive neo-liberal governments and the 'withdrawal of the State'. This has many faces - job loss; a mental health epidemic; failure of representative democracy and a sense of abandonment by the national government; various fundamentalisms of the BNP and political Islamism that offer scapegoating narratives of unknown 'others', which consolidates separateness; and a fractured economy of un and under employment and rising poverty.

In the final section *Distress in the City* explores initiatives underway in Stoke that give rise to hope and the potential to re-invigorate civil society.

This is, to me, the most satisfying and affirming adult education book I've read for some time.

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NOTES FOR INTENDING CONTRIBUTORS

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