

# Wider benefits of seniors' learning: an Australian perspective

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## **Abstract**

It is important to determine what an age-friendly society needs to do ensure quality of later life for seniors so that they can continue to learn and, through learning, to retain confidence, good health, active minds, sociability, empowerment and engagement as they age. There are many studies available in Australia and world-wide to provide an evidenced-based approach to policy and provision concerning learning in later life. However, they document empirical findings and issues but not always actions. Sometimes they are confined to narrow responses that consider only the retention of an older workforce or senior volunteers in urban areas.

This article considers a range of international literature on learning in later life and its benefits but focuses particularly on Australian material, some of it not well-known. It identifies a range of proposals drawn from current studies that draw together key ideas and stakeholder aspirations to create a platform for future strategies. The overall argument is that government policies, national, state and local, do not recognise sufficiently the wider benefits of learning for seniors and that health, care, education and employment policies for seniors are not adequately integrated. Developments in practice and provision are illustrated from two Australian PASCAL workshops on *Seniors as Lifelong Learners* held in 2015 and 2016. The reports of these workshops provide a useful practical filter through which to consider more theoretical literature discussed earlier.

## **Introduction**

Recent figures from the Australian Bureau of Statistics indicate that those aged 65+ account for 14.7 per cent of the Australian population and those 85+ are at 1.9 per cent. (ABS 2012; 2015). The Australian Institute of Health and Welfare has predicted significant growth in the Australian ageing population in the next decades. There will be an increase to 21 per cent of the population in 2054 of those aged 65 and over, with those 85 and over projected to double between 2014 and 2032 (AIH 2015, 232).

Australian governments and institutions are looking for ways to ensure that adequate policies and delivery mechanisms meet the needs of an ageing population and provide for improved wellbeing, sustained good health, enriched quality of life, adequate services for the aged and infirm and, in general, social justice and productivity for those in their later years. This is not a static arena, it is a complex and diverse one as the impacts of social and economic developments on personal, social and economic life are experienced by older people. There is considerable data analysis relating to the welfare, care and employment in later life. It identifies the expectations of Australians that, as they age, they will continue to contribute to supporting themselves and their families and make social, cultural and economic contributions to the wider community. However, not much of this analysis addresses the mediating and enabling value of lifelong learning.

### **Learning in Later Life and its wider benefits: concepts and evidence**

In a report published by the Government of South Australia, entitled “The Longevity Revolution”, Kalache observed the world-wide ageing of populations, especially in developed countries and argued that the need to address ageing and civil order issues is a matter of urgency. He championed the creation of a “society for all ages” (Kalache 2013). The World Health Organisation was influenced by Kalache’s work when it developed its 2002 and 2007 age-friendly practice guidelines and policy framework for cities and communities by adding the fourth pillar of “*lifelong learning*” to its existing three pillars of active ageing:

*the process of optimising opportunities for health, participation, and security in order to enhance quality of life as people age* (WHO 2002, 12; International Longevity Centre 2015, 8; Kalache *op. cit.*).

This official endorsement was in accord with earlier statements from, for example, the Organisation for Economic Co-operation and Development (OECD) and the United Nations Organisation (UNO) (OECD 2007b; UNPF, 2005). Similarly, many bodies have directed forward thinking towards what to do with, and for, an ageing population. An example is the UK GO-Science project that brought together mental capital and wellbeing expertise to advocate a strategic, sustainable and “high level lead within Government” that provided a new approach: one which adopted a “life-course perspective” (GOS 2008, p. 31). This led on to a new foresight project to explore the impacts of changes in technology on skills and lifelong learning, including the value of informal learning (GOS 2010).

Recently, in Australia, Cuthill and colleagues drew, from a consideration of related issues and a wide research base, a statement of factors that should influence policy development for learning in later life (Cuthill *et al.* 2016). They cited an “urgent need” for policy and operational strategies as a priority. They referenced Steinberg and colleagues who argued that minimising risk, building identity capital and strengthening a lifecycle approach to learning inclusive of seniors are fundamental (Steinberg *et al.*, 2007). Individual needs and responses change successively throughout life and into retirement. Therefore, said Cuthill *et al.*, it is positive and

equitable that seniors should not be perceived only as available for an extended work-life or as recipients of care and support in dependency but also as deserving of learning opportunities to assist them in managing their lives in active, fulfilling, purposeful and productive ways. (*op.cit*, 2016, *passim*).

Other scholars, including two who have moved to Australia, have reached similar conclusions. Biggs (2001) raised concerns about the narrowness of perspectives on seniors which identified their social value with “work or near work situations”. Finsden wrote of the “functionalist approach” of educational gerontology that supported self-determination. However, his view is that this approach leaves “societal structures unexamined”. Continuing to grow through one’s later years might not conform with official propositions about later life which do not recognise the wider benefits of lifelong learning, in particular to traditionally marginalised groups of seniors. Finsden argued that further consideration needs to be given to an inclusive remit that places learning as a proactive priority for seniors (Finsden, 2013)

Boulton-Lewis has written extensively on learning and ageing well among older Australians. Of particular note is her article with Buys that investigated the engagement of seniors with learning choices in terms of “a) active ageing and learning, b) involvement/experience with continuing learning, c) value of learning, d) reasons for (or not) to engage in learning, e) interests, facilitators and how they wanted to learn, and f) barriers and facilitators to learning.” Engagement in learning, the authors concluded:

*keeps older people involved in enjoying living life fully through building self-confidence and coping strategies, maintaining cognitive functioning and knowledge, managing their health, keeping up with technological developments, maintaining social relationships and encouraging wisdom* (Boulton-Lewis & Buys, 2015, 763).

Learning is often described as either for pleasure and leisure or for purpose and relevance. Nevertheless, the OECD observed “a general trend towards a more holistic approach to adult learning in a lifelong learning perspective” (OECD, 2003,73). The trend leads to the making of important links. Field claimed a “small, but significant link between learning, health and wellbeing”. He noted that participation in, and experience of, learning can be a key factor in assuring “positive changes” and “associations”. He reflected that it is a combination of possible outcomes - empowerment, self-efficacy, increased community participation (social, civic, cultural, political), the management of transitions successfully, greater sociability to maintaining cognitive resilience - that constitute the value to seniors of engagement in learning (2013, 127).

Desjardin (2008) linked cognitive decline and loneliness to absence of learning activity. Desjardin and Warnke undertook an investigation into the relationships between ageing and skills and concluded that “policy can make a difference”:

*Education, training and a number of physical, social and mental activities have all been implicated as possible factors which help to mitigate the age-related decline in cognitive skills* (Desjardin & Warnke, 2012, 55).

Manninen & Meriläinen (2014) from Finland, reported on survey data from the *Benefits of Lifelong Learning* (BeLL) project. 8646 respondents (40% aged 50+) in ten European countries answered quantitative and qualitative questions on the 'wider benefits of liberal adult education'. They summarised:

*70-80% of respondents experienced positive changes in learning motivation, social interaction, general wellbeing and life satisfaction ... statistical analysis of survey data was used to define 10 benefit factors ... summarised as second order latent factors indicating changes in control of own life, attitudes and social capital and health, family and work (op.cit.,122).*

Some age-related differences were indeed identified. The authors noted that:

*For younger participants liberal adult education serves as a 'stepping stone' into society, improving their sense of control of their own life. For older participants, it is a 'cushion' softening age-related changes like retirement, loss of friends and family members, and skills decline (ibid.,123).*

The Centre for Research on the Wider Benefits of Learning in London touched on different aspects as it affirmed the importance of learning for its "causal influence" on wellbeing, health, attitudes and behaviour. Schuller *et. al.* (2004, 182-191) identified "continual development and reshaping of norms" and the "transformative effects of learning" which, they believed, evidenced the "sustaining value of adult education".

These research findings border on issues of neurological functioning and the growing field of neuroscience. Responding to the contemporary agenda of social outcomes and brain plasticity, the OECD (2007 a & b) reviewed effects on education and learning for every stage in life. Within the PASCAL (Place, Social Capital and Learning Regions) International Observatory's *Inclusion* series, a symposium report edited by Reghenzani (2016) outlined panellist Coulson's comments on nerve cell survival whereby without neurogenesis (renewal of nerve cells) executive functions such as judgement, planning and memory are affected. However, maintaining "enriched" environments (including remaining mentally engaged, new experiences, solving puzzles), exercise and learning new skills "can improve memories and make decline redundant for longer". Desjardin (2008) identified loneliness as a key factor. Recently the American National Institute on Aging (2016) published an exploratory study that showed some links between the genetic components of cognition and years of formal education. The study refers to "74 separate areas(loci) on human chromosomes that are associated with more years of education" and of the correlations between these loci and

*increased cognitive performance and intracranial volume, decreased levels of emotional instability (neuroticism) and decreased risk of Alzheimer's disease.*

Such findings are a tiny indicator of further research findings to come and of conclusions which, hypothetically, might link to learning in later life.

The articles of the 1948 United Nations Universal Declaration and the principles expressed by the United Nations Population Fund (UNPF, 2005) assert that it is a democratic right for all citizens to participate and be included in society. In a study from the University of Canberra on economic and social exclusion among seniors in Australia, Maranti and Yu (2011) found that without sufficient access to “material resources, social relations, civic participation and basic services”, cumulative protection for the older cohort (age 55+) came from having had a higher education, better income and good health. Cuthill *et. al.* (*op. cit.*) argued that a basic right of social participation could be “processed through appropriate learning opportunities”. It may be that what Jackson identified as “critically focussed lifelong learning” will meet also the fundamental issues of equity and social justice for older people. The theme of inclusion echoes throughout Jackson’s collection of edited papers with such reciprocal comments as:

*Social justice can be developed through engagement with lifelong learning... [and] a commitment to social justice brings about the development of lifelong learning* (Jackson, 2011,13).

### **Learning in Later Life and its wider benefits: barriers, developments and action research**

Australian literature on lifelong learning abounds with references to ‘barriers to learning’. Boulton-Lewis, Aird & Buys (2016) investigated and devised a concise model of “structural” and “personal/dispositional” barriers to participation in learning in later life. Structural barriers included those relating to cost, organisational processes, absence of programmes of interest, transport/access, negative attitudes towards seniors and information available. Among personal and dispositional barriers, the more prominent were those of self- assessment of capabilities, family responsibilities, lack of time, fear of educational situations and physical limitations. It is relevant here, under the heading of “family responsibilities” to refer to gender roles in some Asian cultures that keep women often at home for care-giving duty (Wang, 2013). As a multi-cultural and diverse country, Australia has some carry-over of these customs across an expanse of influences from original nationalities.

Two PASCAL ‘Inclusion workshops’ on *Seniors as Lifelong Learners* were held in Melbourne in November 2015 and Brisbane in March 2016 and reported by the author. (Reghezani, 2015 & 2016). The PASCAL International Observatory, established in 2002, describes itself as a “global alliance of researchers, policy analysts, decision makers and locally engaged practitioners from government, higher education, non-governmental organisations (NGOs) and the private sector”. Among its themes are the promotion of social capital and social inclusion and the development of learning cities and regions which facilitate lifelong learning and promote knowledge sharing.

In the two Australian workshops a range of comments and suggestions emerged from presentations and debates around interrelated factors that assist or impede participation by seniors in lifelong learning. There were real-time, practical discussions on issues of concern which were being investigated and programmes

delivered by community-focused groups. Representatives came from all sectors of society - the result of coordinators working in an inclusive way. Some key discussion highlights from the workshops follow to exemplify some of the projects concerned with learning in later life current in Australia:

- The National Seniors Productive Ageing Centre (NSPAC) is co-funded by National Seniors Australia and the Department of Social Services. Its goal is to advance knowledge and understanding “into all aspects of productive ageing to improve the quality of life of people aged 50 and over”. It claims to play a “pivotal role in bridging the gap between traditional academic researchers in ageing, the community and decision-makers”. Its 2015 National Seniors study, *Never Too Late To Learn: Learning education and training among mature age Australians*, while concerned with the human capital agenda of older worker opportunities in labour market, did survey learning, education and training in Australia. It found that the highest rating for importance in lifelong learning was given to personal enjoyment/fulfilment by the age 50 + cohort. It was more commonly, in the previous three years, older women aged 50-59 from higher educational and occupational backgrounds who attempted to undertake learning, education and training. Barriers mirrored those identified by Boulton-Lewis, Aird & Buys (2016) but presence of younger/better educated learners, self-doubt and previous poor learning experiences were also mentioned (National Seniors Australia, 2015).
- The Brotherhood of St Laurence, which is active throughout Victoria but also across Australia, is a community organisation that works to prevent and alleviate poverty. A report from its Inclusive Ageing Team was made on a study entitled *Knowhow for later life*. The study enquired into what ‘knowhow’ older Australians thought they needed and how they preferred to acquire it. The report showed that older Australians were keen to be well informed and autonomous in managing their lives but sometimes reluctant to perceive themselves as learners. However, it was social interaction and engagement that was more important for them in achieving ‘knowhow’ than using personal attributes and skills, accessing information, accumulating knowledge through life experiences or intentionally pursuing learning. Remaining socially connected was seen as difficult for older Australians who were isolated by a wide range of factors which included health packages that kept them in home-care, limited mobility, poor public transport and online care services (Kimberley *et al.* 2015).
- Libraries in Australia have been playing a burgeoning role in providing open access to informal learning opportunities that can also bring the generations together. Senior audiences are major users in Victoria for the general public programmes, programmes targeted on seniors and the provision of technology, digital literacy and ‘makerspaces’ (spaces for creative activity). At the Melbourne workshop Siegmann referred to the state-wide provision of enrichment-oriented classes, events, outreach, virtual visitor, training, use of meeting rooms and talks that incorporated social learning opportunities (Reghenzani, 2015). Landmann, at the Brisbane symposium, described

the aspirations of the city of Brisbane to link seniors with the richness of its libraries as community learning hubs for lifelong access “to connect, read, learn, work, relax and explore new ideas”. The city’s evolving aim is to provide a safe, comfortable and convenient environment to encourage learning for living, engaging, gaining experience and collaboration in order to promote the development of a learning society (Reghenzani,2016).

- Tech Savvy Seniors is a programme concerned with the potency of building online skills in overcoming the digital divide for seniors. Library presentations in both workshops had mentioned the value of their partnership in this Australia-wide “Telstra Connected Seniors” programme, conceived out of digital inclusion sustainability initiatives. In the Brisbane workshop, Robinson reported on an outcomes study in which increased internet and online use by seniors helps them to stay connected, access information and make decisions. Adapting to the digital divide was described as an imperative for seniors, not merely to access services or to extend working life but in firmly addressing social justice issues and as an enabler of lifelong learning, akin to Jackson’s (*op. cit.*) “critically focussed lifelong learning” (Reghenzani, 2015 & 2016).
- Community groups were represented by specific presentations from leaders within U3A and Men’s Sheds. Aspects of the self-help, self-run and sharing peer knowledge/skills “structure” whereby participants are agents in their own development through learning were seen as positives. Governments do not provide financial support for these groups and they sometimes struggled for continuity. Yet worthwhile learning is an evident product overall. Other community groups committed to lifelong learning attended the workshops and expressed their concerns about resources for outreach to those seniors not normally engaged in educational activity and about attracting fresh, paid-up members. Seniors personally paying for learning choices as they age refer us to Biesta’s observations on the world of “individualisation” that stand as an indictment of governments influenced by an economic, utilitarian rationale only (Biesta, 2006; Reghenzani, 2015 & 2016).
- In the Pascal workshops, Australian learning cities/communities/regions were profiled through exemplars of councils in municipalities and shires that have declared identifiable age-friendly policies, strategies and action plans to form part of their social justice, community, economic, and human service missions. Holistic and cohesive approaches are being used by them to harness and mobilise all the providers and partners of learning opportunities into mutual engagement with constituents across their lifecycles. The intended raising of aspirations and responses to meet needs throughout the lifespan is based on approaches of proactive lifelong learning activities and getting to where people are.

The concept of ‘learning cities’ was discussed in both workshops. It encompasses notions of what are healthy, safe, cultural, liveable, resilient, smart, knowledge-based, green and age-friendly foci for such cities. In a learning city, learning is perceived as the platform and the umbrella - for without learning at the heart, the other notions cannot reach full potential

and thus remain unintegrated into the whole. For seniors, enjoying fulfilment in the later years is the key: it goes beyond health and wellbeing; it is inextricably linked to being thoroughly active, engaged in, connected to and content with ongoing learning in later life

Extensive resources for learning city initiatives are available at <http://lcn.pascalobservatory.org>; <http://pie.pascalobservatory.org>; <http://learningcities.uil.unesco.org/home>.

### **Learning in Later Life and its wider benefits: a holistic agenda**

The European Commission, through its Directorate General for Employment, Social Affairs and Inclusion, conducted a systematic review in 2015 of adult and senior lifelong learning and produced a renewed European Agenda for Adult Learning (European Commission, 2015). While, of course, it emphasised the essential link between lifelong learning, the economy and an effective workforce that was regularly up-grading its skills it also drew attention to the benefits of learning for individuals of all ages and the community. It implied that social and economic growth was:

*linked to the availability of learning opportunities which governments fund in whole or in part and the amount of government investment in learning; this suggests that critical policy actions should be those which increase the availability of learning (op.cit., 155).*

The European Lifelong Learning Platform (European Civil Society for Education), also in 2015, wrote of lifelong learning in the knowledge society in terms of relevance, equity and quality for all and of the complementary goals of “social cohesion, active citizenship, personal development and wellbeing”. It emphasised a humanistic and holistic approach to these goals throughout the lifespan, including in later life. (European Civil Society for Education, 2015, 8).

At the level of policy statements on lifelong learning and learning in later life by the Australian states, the same kinds of objectives and aspirations, referring both to the production of an effective workforce and the links to “personal development and wellbeing” can be found. Indeed, in recent times, there has been movement in social policy by the Australian states (Victoria, West Australia, South Australia, Tasmania and Queensland in the main) to adopt the language of an ‘age-friendly’ approach. Much of this is due to an awareness of changing demography in Australia (particularly through the appointment of Commissioners for Seniors in some states), the advocacy of Kalache (*op.cit.*, 2013) and key organisations such as National Seniors (*q.v.*) and the Committee on the Ageing (COTA) which promotes “the concerns of older people at the highest level of government”.

Australian states have largely accepted the four WHO pillars of health, participation, security and lifelong learning as policy. However, the acceptance remains largely theoretical. Most do not seem to have the necessary aspiration and drive to implement a practical recognition of the wider benefits of senior learning. There have been some surveys and action statements acknowledging the role of lifelong learning in ageing well and in identifying learning activity as part of civic participation.



Queensland used to have an extensively funded government state-wide Adult and Community Education service, offered through public and private schools, community groups and agencies and accessed by many seniors. This has now been lost and only partially replaced by private, voluntary or commercial class or informal provision. Public consultations which led to the 2016 report *Queensland: An age-friendly community action plan* revealed immediate interest in improving access to outdoor spaces and buildings, transport, housing and social participation as the top four priorities. However, its recommendations were limited because i) they were aligned with the facilities and infrastructure of the major cities and provincial towns but not the rural areas and ii) lifelong learning seemed restricted to the goal of *civic participation and employment*.

One state has gone further. The Commissioner for Senior Victorians published a report in 2016 under the title *Ageing is Everyone's Business: A report on isolation and loneliness among senior Victorians*. The report suggested that isolation and loneliness is a significant issue for Victoria, affecting 10 per cent of its ageing population. The relevant state minister responded swiftly that he would set up a new information and communication initiative in his department – Life planning for Seniors – which would encourage older people to plan actively for healthy and active ageing. A new Age-Friendly Victoria initiative would spend \$2.2 million over four years in grants for age-friendly projects led by councils. He wrote that

*the government's vision ... means building a lifelong love of learning in our community and providing opportunities for an excellent education for all... It means tapping into our existing community resources and capabilities, including the valuable contribution of older Victorians ... in the learning and development of children, young people and adults"*  
(Commissioner for Senior Victorians, *op. cit.*, *passim* 2016).

However, one should not underestimate the difficulties of policy change by governments, whether national, state or local. It is not just a question of deciding to change policy on lifelong learning or advocating the wider benefits of learning in later life. Where do the difficulties lie primarily? Schuller and Watson, in their 2009 publication following the UK *Inquiry into the Future for Lifelong Learning*, in effect argued that the difficulties lay in the conceptualisation of learning through life and in the allocation of resources to it by society. They conceptualised lifelong learning policy in terms of four stages over a whole life journey, viewing retirement as fluid and arguing for resources to be re-allocated so that increased education and training opportunities would continue into and beyond the 'The Third Age' of the central years, 50-75 years. The fourth stage was another key transition for those aged 75+, during which "authentic" learning opportunities needed to continue to be available and suitably resourced by society. Schuller and Watson may have identified a key issue – that learning in later life needs to be re-conceptualised and resources consequently shifted to match the changing age-profile of societies. However, their recommendations have not been pursued and may seem too radical for present-day governments (Schuller & Watson, *passim*, 2009).

In a developed and different analysis from Australia, Steinberg and colleagues suggested that the difficulties of developing and integrating lifelong learning policies lies in the separate implementation of policies in different areas of operation of government and the divisive conceptual frameworks which are developed to define those areas. They recommended the adoption of a set of key policy levers to strengthen the connection of learning to active ageing. Local, as well as national and state, governments need to be encouraged to integrate “jurisdiction coherence, responses and relationships” to enable the wider benefits of learning to have influence across a number of governmental responsibilities. Cross-departmental actions needed include (among others):

- *initiating policies to break down inappropriate and obsolete barriers that segment work such ... as: recognising that employability skills and life skills have much in common [and] that much is to be gained by developing and valuing them in ways that support these connections*
- *orienting adult learning policies, including vocational education and training, to the growing significance of casual and part-time work for mature age people*
- *recognising economic, cultural and social outcomes from the informal and non-formal learning of adult, further, continuing and community education*
- *valuing diverse life experiences.*

Steinberg *et. al.* also recommended reconsideration of the way in which lifelong learning is funded by governments. To “safeguard lifelong learning from its peripheral status” it could be integrated”, they said,

*with incentive funding provision and well-designed co-financing arrangements into participative community life (e.g. funding schemes, tax deductions, pooling resources, subsidies, individual allowances, philanthropy, etc.). (Steinberg et. al., 2007, passim).*

In a related way, the most recent *Global Report on Adult Learning and Education* of the UNESCO Institute for Lifelong Learning argued that, at governmental level, the key difficulty is the lack of consistency in interdepartmental collaboration that has inhibited adult learning and education from having a positive impact on health and wellbeing, including that of seniors. The Report urged the strengthening of deep partnerships for a “holistic, intersectoral approach” to adult learning. Istance reached a similar conclusion and reflected that social policy needs to re-orientate to ensure that learning for seniors is a central focus and concern. He reiterated Delors’ defining watchword for lifelong learning by referring to “learning to be” as the “becoming metaphor...highly relevant” for active ageing (UIL 2016; Istance 2016, 23; Delors 1996).

In the 2015 study for the Committee for Economic Development of Australia (CEDA), McKenzie gave insights into future challenges which would confront the education system because of economic change. There would be a future of higher long-term unemployment and more redundancies as Australian people

age. McKenzie estimated a high probability of 40 per cent of the workforce being replaced by automation in the next 10 to 20 years. Re-training and up-skilling would be mandatory as workers aged. The minimalist concerns relating to ageing and learning of Australia's Productivity Commission's (2013) were those of initial formal education, labour supply, labour productivity, pension age and the burden on the public purse of older people.

This author accepts the inevitability of change in the nature and conditions of employment while rejecting limited notions of productivity and any attempt to view older people only as cogs for retention in the workforce. There will be a changing economic environment in Australia and many of those 50+ will still want to be part of it. However, many others will want that environment to be shaped to who they are and to where they want to go. Awareness of the wider benefits of learning will take us beyond the narrow prism of labour market, business economy and welfare dependency. This article has demonstrated the existence of a range of research, analysis, development, opinion and aspiration in Australia all focusing on a central thesis. The thesis, put simply, is that seniors should be enabled to engage in lifelong learning opportunities not only for their intrinsic benefits but also because of their benefits for health, well-being and participation in society. This thesis needs to be grounded in the policy initiatives of governments and be the foundation of combined inter-departmental policies on lifestyle, health, active ageing, lifelong learning and employment. While individual experiences of ageing will differ, individuals are not separately ageing seniors, traditional retirees, citizens and clients of health and welfare provision. Australian national, state and local governments can have a unified vision of their role in supporting seniors and lifelong learning will be the focus of that vision.

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