

# Later Life Learning: A post-retirement perspective from Northern Ireland

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## **Abstract**

*Despite an emphasis in government strategy on the provision of later life learning, little is known about the experiences of older people in their pursuit of such opportunities. This paper explores the extent to which middle-class retirees' learning needs are catered for in Northern Ireland. Data from semi-structured interviews suggest that the older learner has clearly defined learning needs. However, there is a perceived lack of support and understanding of these needs by those organisations involved in policy development and policy delivery.*

**Keywords:** Retirees, middle-class, active ageing, later life learning

## **Introduction**

This paper draws on a research study into the relationship between active ageing and later life learning. Whilst the wider study is in the context of informal education and the engagement of the older learner, this paper examines later life learning provision in Northern Ireland [NI] from the perspective of informal educational providers, the Commissioner for Older People for Northern Ireland [COPNI], and the older people themselves. Three main themes, which are inter-related, emerge which shed light on learners' needs. The paper highlights tensions between policy aspirations in terms of meeting the learning needs of older people, against the need to reduce the burden on the public purse. It will be argued that despite the policy rhetoric on promoting learning opportunities amongst older people, there are a series of factors that impede participants from fully realising their learning goals. It is further shown that older people have very specific learning needs that differ significantly from other learners, and where these needs are overlooked it can reinforce older people's sense of marginalisation and isolation.

### **Methodological approach**

A qualitative approach was adopted and data has been analysed following 22 semi-structured interviews which consisted mostly of middle-class retirees, participating in informal learning groups with the University of the Third Age (U3A) in one geographical area in NI. In addition, data from semi-structured interviews with three key informants from separate organisations involved in policy development and policy delivery were analysed.

Ethics approval was obtained before this study commenced and informed consent was given by all participants. To ensure anonymity, group participants which included four co-ordinators, were given a pseudonym which took into consideration their gender and age.

### **Study participants**

The age profile of the participants extends from 60 to 89 years of age with the largest number being in the 70 – 79 age group.

### **Resource allocation for later life learning in Northern Ireland**

The context of this study is situated within the U3A which comprises of independent, self-help groups for older people (The Third Age Trust, 2015). Whilst these groups have the capacity to deliver learning opportunities themselves, there are occasions when they need to utilise the services of the local College of Further Education [CoFE] and other education providers to fulfil their needs. Thus the vision of later life learning that is promulgated through the policy literature is one that suggests a policy context that is inclusive of retired people and older workers, and one where the emphasis is on enabling older people to learn new skills alongside younger people (HM Government, 2009). Significantly, and despite this emphasis though, key informants interviewed in this study suggested that affording opportunities for older people to engage in learning was a lesser priority than might be expected. The COPNI, for example, identified priorities for action in terms of older people in NI but it is significant that none of these specifically refer to informal learning:

Some difficult choices had to be made about what was in and what was not because it is a small office with a limited budget. So you won't find any of those that are specifically dedicated to lifelong learning or what you are terming informal learning. However, there will probably be links that could be made particularly with regard to the employment project ... for ongoing training and re-training and for the same opportunities that are available for younger people to be made available in later years (COPNI).

Yet even where opportunities do exist for older people to avail of education, not all are able or willing to exploit them. Government strategy in NI (OFMDFM, 2006) makes it clear that older people over 60 need to increase their use of information technology and there is an implied expectation that older people might engage in more distance or online courses. However, the expectation that older people should participate in online learning seemed to misconstrue the specific learning needs of the older person and this was well captured by the interviewee from COPNI:

Everyone is being directed to do things online and remotely. Older people and a lot of younger people and all people want a face to face learning and communication and social engagement to foster relationships and networks and develop their informal education. The digital by default isn't going to work for that. It works for people who are busy doing jobs all day long or with families who are happy to do their learning in their solitary time but when it is a solitary activity and one that is screen based that is not attractive (COPNI).

In many ways taking online courses defeats or at least misapprehends the purpose of the learning that older people seek. The learning required is not often simply subject based, but is also about building relations and engaging with peers. Focusing on online courses as a mechanism through which older people might exploit learning needs is likely to undermine this objective and was something that was picked up by several participants, who pointed both to their lack of technological skill as a key barrier as well as the sense that this type of learning did little to aid their enjoyment.

The Department of Employment and Learning [DEL] allocate funding to Colleges of Further Education to support education taking place in community groups (DEL, 2008). However, and perhaps reflecting the comments from the COPNI above, the chief concern of the interviewee from the CoFE was less on older people and more on meeting the needs of the NEETs category of society [not in education, employment or training]:

The learning is aimed at people who didn't have a Level 2 qualification and they were wanting to go back to work. Because of ageism you couldn't sort of say to the third parties, don't go out and recruit retired people. It's looking at people getting back into work (CoFE).

In some ways this is not surprising as government strategy is focused on those who are unemployed or classified as NEETs (DEL, 2014). As a consequence, the funding received from DEL is 'ring fenced' to the NEETs category of society. This decision however to create composite classes comprised of older and younger people is not fully consonant with the learning needs of older people, and had the effect of repelling rather than encouraging their involvement; two separate but related themes emerged from the data which shed light on the problems with the current approach.

### **The learning environment**

#### *Students' conflicting motivations*

The decision to combine classes for NEETs and the older learner inevitably raise questions about the conflicting motivations of the different types of learner and this was a constant theme in the interview data. It was clear that older people preferred not to engage in education in a classroom with teenagers with different priorities and behavioural patterns. The interviewee from the CoFE fully acknowledged the issue:

I think older people generally feel happier coming to a class together. They would maybe see the college as full of youngsters and they don't want to come in and do a class with young people. So if they can come together, even two or three of them, I think having somebody else to do it along with definitely is an encouragement and I think coming in on their own for some older students think "I will end up in a class with these whizz kids who know their way around a computer and I will not go" (CoFE).

Hence, the objective of encouraging older people to learn alongside younger people appears not to be something that is necessarily in the older person's interests or palatable to them, especially if they are attending a class on their own. There was mention of intergenerational learning, however, the participants demonstrated uncertainty and a lack of enthusiasm for it, and there was no evidence in this study of it being successfully implemented:

[*Name of school*] are working alongside us a bit, they are being very good, they have offered us their computer suite if we want it and also if we want to join in with their pupils because they are also trying very hard to make their pupils realise that old people are not elderly, old people are good fun, intergeneration work, and they are very keen on that. They have actually offered us their facilities but they are not great from the point of view of

making tea because there is a coffee shop in the school and they would be finished when we would be using it so we are not really sure (Susan).

This reticence to use the school facilities and to learn alongside the pupils may be considered a missed opportunity for both young and older learners. Yet engagement of later life learners can be achieved when the learning is meaningful and of interest to them (Formosa, 2011; Glass, 1996). Whilst the interviewees from the CoFE and COPNI appreciated the difficulties that these issues raised, there was little real sense that they sought to challenge the prevailing orthodoxy – instead there was a sense of resignation to the prevailing system:

That's the DEL programme and the way we have to run with it...it is really based on getting people back to work (CoFE).

Similarly, the interviewee from COPNI, whilst acknowledging the problems that such an approach invariably creates and to whom older people have voiced their concerns at being excluded from learning opportunities, was apparently unable to offer any substantive challenge to it:

At the minute the focus on learning is generally for those who are unemployed and have been unemployed that are NEETs. We had older people round the table in the boardroom saying we are NEETs too. We are not in education, or employment or training. That is pretty hard to argue with (COPNI).

Yet their inertia and lack of challenge to these practices had quite negative effects on the older learners, who were acutely aware of the lack of attention to their needs and there was a palpable sense of frustration. They lamented the lack of support offered by government agencies and their comments revealed that they were deeply cognisant of the gap between the official commitment to the education of older people, and the support for those wishing to avail of informal learning:

They preach, but they don't encourage it at all. They need to sort their camp out. There are too many older people who are just left to flounder now (Susan).

This sense of being ‘left to flounder’ was resonant across several interviews and was perhaps compounded by the fact that participants felt that they had limited information about the range of, and access to, alternative sources of educational provision for older people in NI.

#### *Student aspiration*

All of the participants suggested that they wished to learn for enjoyment and to enhance their quality of life. However, there was a general concern that the objectives of the key provider of informal education in NI, the CoFE, did not reflect these aspirations. The emphasis in the classes offered was on formalised assessment and the acquisition of formal qualifications. The interviewee from the CoFE, although aware that older people did not always seek qualifications, explained that due to curriculum restrictions enforced by government funding they were not in a position to provide non-accredited education (DEL, 2014; McNair, 2009). However, efforts were made to facilitate learners’ needs. When a Level One qualification was achieved by participating in courses facilitated by the College, learners, especially older people, were permitted to repeat the same course as many times as they wished, without the need to work towards further accreditation. Whilst this, according to the interviewee from the College, had a clear benefit in so far as it enabled participants to continue attending classes to refresh their knowledge and skills, due to pressures on the College budget, a more stringent approach was implemented; this was something that the interviewee readily agreed had the potential to undo the benefits of the programme:

Now we police that much more...and the message has got through if you have already got the qualification you cannot come back. But I think quite a few of them do want to come back because if it is something they don’t use all the time they forget it and it maybe takes that wee bit longer to bed in, so I think there are definitely people out there who want to do a course without an accreditation. But then that brings a fee to it and particularly the leisure courses are much higher then than an accredited course (CoFE).

Learning solely to acquire qualifications is generally not a priority for older learners. For example, older people are often attracted to informal learning opportunities precisely because there is not an emphasis on formalised assessment procedures (Formosa, 2012; MacKean and Abbott-Chapman, 2011; Withnall, 2006). The data in this study similarly suggested that such requirements held little appeal. Rather, the primary motivation for participants to engage in learning was to extend their knowledge and skills, than to gain a qualification, as the following extracts make clear:

We don't really want a little piece of paper...and certificates to say we had done that because we didn't want to sit the tests...we just wanted to learn... you are learning and you know you are learning but you are not trying to get a certificate at the end of it (Donna).

When I got there they said, "now at the end of the course there are these exams", well I nearly had a heart attack, I said I don't want to do exams, I am only here to enjoy myself (Anna).

The desire to learn for fun and enjoyment without the restrictions of a syllabus (Coffield, 2000; Mark *et al.*, 2010), or the need to gain a qualification (Yenerall, 2003), are crucial for older learners as this freedom can allow participants to learn what they want and at their own pace:

There is no real pressure on you...it is not like a school situation where you have to learn stuff for an exam. You just take it on board if you wish and you can expand on it in your own time or go to libraries or read books. Sort of take it at your own speed if you like (Gary).

Indeed, taking examinations were not cited by any participant as an objective and as noted above may potentially detract from and impair the enjoyment of the learning experience. This is something that is also highlighted by Withnall (2006) who found that the majority of older learners prefer flexibility and no exams as these can be a reminder of previous, sometimes negative, educational experiences. The sense of freedom that is so relished by learners aged 65 and over is also something recognised by MacKean and Abbott-Chapman (2011), as an advantage and indeed an incentive to encourage participation in community-based groups and this was also reflected in the data below:

[*You learn*] because you want to, not because you are forced to do something (Sandra).

Enjoyment is the word I think you would use about learning when you are older. If you don't enjoy it well then don't do it. As long as you enjoy it, that's important (Helen).

Yet, and importantly, the enjoyment that Helen seeks is likely to be increasingly difficult to attain as tensions between funding restrictions and the needs of older people are only likely to intensify in the current climate of economic parsimony (DEL, 2008; DEL, 2014). Yet whilst the informal educational opportunities

offered in the formal setting were not perceived to fully capture the specific needs of older people, participants reported that they found it difficult to access alternative provision.

### **Access to learning opportunities**

In order for older learners to be supported in their informal learning endeavours there needs to be a commitment by policy makers and local providers to the promotion and advertising of learning opportunities and a recognition of the need, ensuring that the acquisition of learning places and spaces in the community is facilitated (Aldridge and Hughes, 2012). Responses to this study suggested, however, that there was a general lack of awareness amongst older people in terms of where learning could take place and this was fully acknowledged by the interviewee from COPNI:

Older people will access learning opportunities that are available to them and those are not equal across Northern Ireland, they are in pockets. And older people who are looking for those kind of opportunities are in the more mobile, better off, keeping active category and a lot of what we are doing is trying to get in touch with and act on behalf of older people whose voices are more seldom heard (COPNI).

Moreover, there was considerable evidence to suggest that the availability of information in local communities informing older people of learning opportunities was inadequate. For example, the key informant from the U3A suggested that it provides 'at least 200,000 hours of learning per year at no public cost' but has concerns about the lack of information made available to older people:

Many lack awareness of the opportunities available to them. And there are lots out there, groups of all sorts...but there is no general information... things need to be plugged a bit more to let people know more about them because most of our members come by word of mouth (U3A).

This dearth of information was well explained by one of the participants who described the resistance of a local health centre to a request that they advertise some of her educational group's activities:

I said to Dr [*name of doctor*] would it be possible for me to put a poster up about the U3A, he says, "oh, I cannot do that, once I start putting posters up then I have to put posters up for everybody". I said wait till I tell you

something, if you would put a poster up you would have half the work to do in here because the majority of your elderly people come here as a day out. It is their wee way of having something to do and if they had that, you might gain 10% less appointments. I said I am sorry you could not oblige me (Susan).

This finding is similar to the work of Leon *et al.*, (2015) in relation to negative attitudes towards older people by healthcare students. However, this is a particularly important comment, as it was made by a healthcare professional who might be expected to be empathetic towards the plight of older people, and also to appreciate the potential for staving off health issues through learning. Although this is only one comment, it does illustrate the challenges that were experienced by participants in relation to their social marginalisation. Rather than recognising the benefits learning might have for them, it further perpetuates the risk of marginalisation and subjugation of the older person in NI. Such a negative response to advertising inevitably compounds the lack of knowledge about learning opportunities and potential isolation of older people and is significant, particularly when considered in the context of the official rationale for widening access to educational opportunities for older people (HM Government, 2009; OFMDFM, 2006; UNECE, 2012; United Nations, 2002; WHO, 2002). However, to counteract such negative experiences and to promote their groups, participants had ideas about how things might be improved:

I think when you become pension age, not only should you get a pension book, you get a résumé of what is available to you as a pensioner whether you want to join a U3A group or whether you want to work for cancer research (Susan).

Something which actually we are thinking about this year is having an open day...it's probably telling people there is a world out there when you retire (Michael).

Yet it was not just the lack of advertising that hindered older people from exploiting learning opportunities. There were also concerns that public space was not made readily available for classes to take place within the community. So, for example, access to local facilities in the community, such as libraries, was recognised by Government (OFMDFM, 2005) as something that may encourage older people to participate in learning.

The interviewee from the U3A suggested that although libraries had an agreement whereby they could be used as spaces for informal learning for older people, there remained quite significant gaps in the provision. Her reference to 'neutral venues' directly relates to the societal division in NI and raises important issues around the intersection of the conflict with learning opportunities for older people in NI:

We want the opportunity to replicate the type of agreement which we have with the libraries with other public buildings and hope to ensure that the official strategy be implemented at local councils, education and health board levels...It's very hard to get neutral venues. I think that is a bug bear. There are no neutral community places. You are either stuck with a church hall or a chapel (U3A).

Significantly, the venue also had an impact on the learning experiences for the older men in areas of social disadvantage in the study by Mark *et al.*, (2010). These older men felt intimidated as they had to leave their own familiar surroundings and enter a different community in NI to access learning opportunities. Although the participants in this study were mostly from middle-class backgrounds, the need for familiar surroundings and neutrality was also important for them. This need is particularly relevant in NI as social identity is 'multifaceted with historical, religious, political, social, economic, and psychological underpinnings' emanating from the sectarian conflict known as the 'Troubles' from 1968 to 1998 (Goeke-Morey *et al.*, 2015, p. 283). The absence of neutral facilities in local communities and charges incurred for the hire of rooms places an additional financial burden on community learning organisations which is ultimately transferred to the older learners. Despite their resilience to a perceived lack of support, and lack of enthusiasm for online courses as discussed above, occasionally the retirees were reliant on teaching input from external sources. However, the teaching approach adopted by external tutors sat uneasily with the needs of the older people and did not always meet their expectations.

### **Conclusion**

The purpose of this paper was to examine perceptions of the extent of support available in NI for older people who were mostly middle-class retirees, wanting to engage with later life learning. Whilst the data cannot be generalised it is suggested that, despite a national and international policy emphasis on involving older people in informal learning, there is a notable perceived lack of support

and understanding of their needs. As a consequence of these perceptions, the retirees in this study have used initiative and created opportunities to fulfil their needs independently. There is little doubt that the educational and working experiences of participants smoothed their route to becoming involved in informal learning groups, and this raises questions about the extent to which those from less advantaged groups are supported in their endeavours to engage with learning (McAleavy *et al.*, 2004; McGrath, 2009; Withnall, 2006).

What is perhaps most significant is that despite the extensive policy rhetoric which champions the value of informal learning for older people, the data presented here suggests that there is very little real support from Government policy and the CoFE to accommodate the learning needs of those older people who want to learn without restrictions, or the need to undertake further qualifications (Formosa, 2012; OFMDFM, 2005). This lack of support for their needs is leading to the subjugation of older people, giving a sense that they are inferior to society. This is resulting in older people having to overcome considerable barriers and fight to have their learning needs met, resulting in them having to make provision for themselves. Given that the participants in this study were mainly educated to degree level and familiar with social and political structures, it is recognised that this may have contributed to their enthusiasm and motivation for participating in their learning activities. A longitudinal study with a cohort of recent retirees, drawn from different social classes across different geographical areas would be really interesting. This could shed light on the socioeconomic dimensions and the barriers that are faced by those who are less educated than those in this sample as highlighted by Mark *et al.*, (2010).

Whilst the voluntary and community sector have increased provision of informal learning opportunities, they also are restricted in the opportunities they offer, due to the stringent conditions placed on sources of funding received from Government. Therefore, a greater appreciation of the needs of older people, and particularly middle-class retirees, might allow them to be recognised and supported. The irony is that without these informal learning opportunities and support, it is suggested that middle-class retirees could inadvertently become dependent on healthcare and government benefits and thus the burden on the public purse could become even greater (Findsen *et al.*, 2011; Foley *et al.*, 2008; MacKean and Abbott-Chapman, 2011).

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