Educating older adults: Discourses, ideologies & policies 1999-2005 [1]

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Abstract

This article tells the story of policies relevant to education, ageism and older adults betweeen 1999 and 2005. It follows an article published in a previous New Zealand Journal of Adult Learning that described and critiqued policy developments between the 1980s and 2001. The story is located in the context of ongoing historical struggles between competing discourses and the article discusses their impact on tertiary education, ACE and the place of older learners. By way of contrast with the 1990s, during which neoliberalism and pragmatic conservatism held sway, this article suggests that the period from 2000 to 2005 saw the renewal of social democratic and progressive discourses and in particular the rise of a 'modernised' or 'third way' form of social democracy with its emphasis on managerialism and welfarism.

Introduction and background

This article follows a previous one which provided an overview and critique of policies from the 1980s to 2001 (Tobias, 2005a). It draws on a similar theoretical framework and tells the continuing story of policies about education, ageism and older adults betweeen 1999 and 2005. The story of change is located in the context of ongoing historical struggles between competing discourses and ideologies and their impact on policies for tertiary education, adult and community education (ACE) and the development of a *Positive Ageing Strategy*. The evidence on which the article is based has been drawn almost exclusively from official documents. Further research is needed to elaborate on the findings.

The article begins by describing the theoretical framework used. It then examines in some depth the way in which the *Positive Ageing Strategy* was developed between 1999 and 2001 and describes and critiques key features of the Strategy. The article then discusses the development of relevant policies in tertiary education and ACE over the same period. This includes a brief review of selected aspects of the recommendations of the Tertiary Education Advisory Commission (TEC) and a somewhat more extensive discussion of *Koia! Koia*!, the 2001 report of the Working Party on Adult Education and Community Learning. This is followed in the second half of the article by an examination of policy developments between 2002 and 2005. This includes a review of the tertiary education legislation of 2002 and the first *Tertiary Education Strategy 2002-7*. It also includes a full discussion of the development of ACE policy between 2003 and 2005, and concludes by examining the continuing implementation of the *Positive Ageing Strategy* with special reference to its implications for education.

Theoretical framework

The definition of 'older adults' is and must remain problematic. Although chronological age may be a significant factor in people's lives and provides a 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 (Withnall, 1997). Class, gender, race, ethnicity and prior experiences of paid and unpaid work, leisure and education are other factors likely to exert at least as much influence on the lives and learning interests of older adults as chronological age. As was pointed out more than 20 years ago by the Social Advisory Council: "The most significant single characteristic of older people is not their age but their diversity" (Williams et al., 1984 p. 19).

The development of policy on education and older adults may best be understood by locating it in the context of the historical struggles between competing discourses and ideologies. Notions of discourse and ideology are both complex and multi-faceted. Both are contested concepts and have been used in a number of different ways and within a variety of theoretical traditions ranging from Marxism to post-structuralism. However, both concepts do make important, and, I believe, different theoretical contributions to policy analysis.

The notion of ideology, coined in the late-eighteenth century and with its roots in Marxism, highlights the impact of the material conditions of production on people's consciousness (Gramsci, 1992, 1996; Williams, 1983). Ideology points out that under capitalism, dominant or hegemonic institutions are necessarily engaged in producing, reproducing and legitimating those forms of consciousness which support the maintenance and strengthening of capitalist structures and relations. The notion of ideology also raises questions about whose interests are served by changes in policy and political direction, and locates these issues in the context of class struggle as well as in the context of other struggles including those concerning gender, ethnicity, race and age.

The notion of discourse is both broader and more specific than ideology. As a tool of social analysis it has a shorter history, dating back effectively only to the work of Foucault in the 1960s and 1970s. Crowther (2000 p. 480) notes that discourses "are essential for constructing what we know and, more importantly, the limits of what is knowable about the world. They constitute the language, assumptions, ways of thinking, problems and practises which are regarded as appropriate and legitimate…". For Foucault, discourses are about "what can be said and thought, but also about who can speak, when and with what authority" (Ball, 1990 p 2). Discourses constitute knowledge-power formations which govern or control people, and within which people are positioned in very different and unequal ways. Discourses then are all-pervasive and immensely powerful. Nevertheless, as Foley points out, they are always open to challenge (Foley, 1999 p 16).

Both concepts also share a number of similarities. Both draw attention to dimensions of power and inequality and to the contested nature of language

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and belief systems underlying policy development. Both highlight the hegemonic nature and functions of dominant forms of language and structures of meaning, and both address the role of language, belief systems and institutions in producing, reproducing and challenging the relations and structures of power in social formations. Moreover, both also suggest that the language used to frame and formulate policy and the assumptions and beliefs underpinning policy proposals cannot be understood without examining the wider political and economic contexts in which policy is developed.

This study draws on both concepts to examine relevant policy development. This is done in the light of historical struggles as these have been reflected in the conflicts between the following discourses and ideologies:

- socialist and social democratic discourses and ideologies, linked here with various Maori, progressive and feminist ideologies;
- conservative and neoconservative discourses and ideologies including populist and pragmatic forms of conservatism; and
- neoliberal discourses and ideologies which have challenged the welfare state compromises which had been negotiated between capital and labour in the mid-20th century.

Socialist, social democratic and other similar discourses and ideologies have historically emphasised the social nature of human beings. Their skills, capacities, interests and understandings have been seen as largely socially and historically produced or constructed; hence they are open to change or re-construction. They have endorsed individuality and 'personhood', whilst rejecting ideologies of individualism (Lukes, 1973; Williams, 1983), since these have assumed that there are certain fixed or 'given' psychological features (whether these are called instincts, faculties, needs, rights, etc.) which define or constitute human nature, independently of social conditions and hence determine appropriate social policies.

Socialist discourses reject the expansion of private, corporate ownership of the means of production, consumption and exchange under global capitalism and in particular the commodification and privatisation of resources, goods and services. Most social democratic discourses, on the other hand, have not rejected outright all forms of capitalism and private ownership. Within these discourses, however, the state, has performed a key role. Through democratically elected governments, the state has been expected to fulfil a number of vital functions. These include maintaining and developing public ownership and control of assets and resources considered essential to collective economic, social and cultural well-being, providing education, health and welfare services and mitigating the ill-effects of capitalism.

Participants in these discourses have not necessarily shared a common political agenda. Indeed, since the rise to power of New Labour in the UK in the late-1990s a new form of social democracy, embracing the so-called 'Third Way', has been widely promoted. Giddens (2000 p. 5) thinks that the third way makes it "possible to combine social solidarity with a dynamic economy, and this is a goal contemporary social democrats should strive for". This goal is, however, not new to social democracy. In spite of important differences, discourses of socialism and social democracy have generally allowed for and

supported a range of progressive policies and programmes which involve using the instruments and resources of the state to achieve collective ends.

These discourses, therefore, emphasise the key role that should be taken by the state in providing, promoting and supporting:

- learning opportunities for people of all ages including older and younger adults from working class and other backgrounds who have previously been marginalised or excluded by dominant forms of economic, social and cultural exploitation, and including a wide range of adult and community education (ACE) programmes;
- projects and programmes to challenge inequitable structures and practices including those such as ageism, racism and sexism which have stereotyped, excluded or marginalised older and younger women and men from Maori and Pakeha working class backgrounds as well as people from Pacific and other cultural and linguistic backgrounds; and
- a wide range of positive ageing strategies, projects and programmes, including such things as maintaining systems of universal income support, maintaining the affordability and open access to all public services, including health, education and welfare services, recognising and valuing of the contribution, abilities, achievements and diversity of older people; maintaining accessible public transport; and suitable housing options.

In contrast, both conservative and neoliberal discourses and ideologies have been profoundly sceptical about the possibility of positive change or reform arising from state intervention. Both have espoused a minimalist interpretation of the state and have had reservations concerning the welfare state, and both have endorsed various ideologies of individualism. In spite of this, within democratic states such as New Zealand, pragmatic and populist conservatives have accommodated themselves to the need to mobilise people as individuals, rather than as members of a class or other collective movement. To achieve this they have responded politically at times to pressures from various groups with programmes designed to appeal to the majority of individuals. With the increase in recent years in the number and proportion of older people, pragmatic and populist conservatism has responded by designing programmes to appeal to this rising constituency. On the other hand, few ACE programmes are designed for mass consumption, so ACE programmes have received little support from conservative discourses.

Neoliberal discourses and ideologies have given even less support for involvement by the state in providing, supporting and promoting ACE programmes in general, and programmes for older adults in particular. Neoliberalism holds that the institution best suited to securing the interests of individuals is the marketplace. Neoliberals deeply distrusts the state and its capacity to do much more than secure the conditions under which the market may operate with equity and efficiency and protect individual liberties and property rights. Neoliberalism is also distrustful of collective political action and of democracy since they may bring about 'distortions' of the market. It emphasises individual choice, and views the welfare state as a negative force

that intrudes too much in the lives of its citizens, stifling initiative, inhibiting choice, and fostering drab uniformity. The educational language of neoliberalism is drawn from economics and assumes that problems of educational policy are primarily technical and managerial rather than political, and hence should be solved by technical means or else left to market forces (Olssen, 2001).

Policy Development, 1999-2001

The Positive Ageing Strategy
At the general election in November 1999 a Labour/Alliance coalition government assumed office, with policies grounded in tradional social democratic discourses. During its first 18 months in office, the government moved to set up a *Positive Ageing Strategy*. This Strategy had its origins in the 1990s at a time when neoliberal and conservative discourses were in the ascendant, and it was developed as one component of a wider approach to social development (Department of Social Welfare, 1999). The new policy was led by the Ministry of Social Development, and the Office for Senior Citizens, located in that Ministry, played a significant role in overseeing its development on behalf of the Minister for Senior Citizens.

The stated purpose of the Strategy was "to promote positive ageing across a broad range of portfolio areas, and thereby improve opportunities for older people to participate in the community in the ways that they choose" (Office for Senior Citizens/Te Tari Kaumatua, 2002a p. 39). *The Positive Ageing Strategy* is not located in any single discourse, but rather draws on a range of very different and conflicting ideologies including neoliberalism and conservatism as well as ideologies associated with radical, progressive, socialist and social democratic discourses. In order to critique policies on education and older adults it is important to recognise the variety of discourses and ideologies influencing these policies (Tobias, 1991b).

The Strategy was only launched in its final form in April 2001. It included a set of 10 policy principles, 10 priority goals and a set of key actions accompanying each goal which were used to plan policy across thirty government agencies. The policy principles stated that "effective positive ageing policies will:
1. empower older people to make choices that enable them to live a satisfying life and lead a healthy lifestyle;
2. provide opportunities for older people to participate in, and contribute to, family, whanau and the community;
3. reflect positive attitudes to older people;
4. recognise the diversity of older people and ageing as a normal part of the lifecycle;
5. affirm the values and strengthen the capabilities of older Māori and their whanau;
6. recognise the diversity and strengthen the capabilities of older Pacific people;
7. appreciate the diversity of cultural identity of older people living in New Zealand;

8. recognise the different issues facing men and women;
9. ensure older people, in both rural and urban areas, live with confidence in a secure environment and receive the services they need to do so; and
10. enable older people to take responsibility for their personal growth and development through changing circumstances" (Senior Citizens Unit, 2001 pp. 16-17).

These principles reflect a commitment to foster individual choice among older people while recognising the importance of their contributions to communities. They also reflect a commitment to promote positive attitudes to older people, the 'normalisation' of ageing and the recognition of the cultural diversity of older people and the impact of gender and rural/urban differences. The principles reflect predominantly a form of pragmatism which embraces elements drawn from various other discourses including both conservativism and neoliberalism. There is thus little in this statement which points to the necessity of involvement by the state in programmes of education and action in relation to older adults or ageism, and there is no reference to the differential impact of material circumstances on different groups of older people.

During 2000 extensive consultations had been undertaken by government to obtain feedback on these principles and to identify priorities for action. The Senior Citizens Unit's Community Volunteers organised 25 focus groups around the country. These involved more than 600 people. In addition, Te Puni Kokiri, the Ministry of Pacific Island Affairs, the Pacific Older People's Auckland Network and the Senior Citizens Unit organised a number of hui and other gatherings, and Age Concern organised a forum attended by "over 100 key opinion leaders from the voluntary, business, health, education, local gogernment and central government sectors" (Senior Citizens Unit, 2001 p 30).

Overall, there was general agreement with the initial statement of principles. However, there were also criticisms. At the Age Concern Forum in September 2000 it was argued that the principles did not provide a sufficiently clear and strong foundation on which to base the Strategy, that they did not lead directly to action, and that they should therefore be "re-written as explicit and meaningful action statements" (Senior Citizens Unit, 2001 p 30). This Forum also noted that the principles did not include any references to learning and education. It therefore recommended that "fostering lifelong learning for all age groups" (Senior Citizens Unit, 2001 p 30) should be included as one of thirteen 'points of action' which should form a key component of a Positive Ageing Strategy.

Participants also indicated that the most important areas that government could focus on to create a society in which people could age positvely were health, income support, positive ageing, transport, home support services and carers, and government planning/policy. The most commonly identified priority issues were: adequate New Zealand superannuation/retirement income; positive ageing education programmes; recognition and value of the

contribution, abilities, achievements and diversity of older people; certainty of retirement income; accessible public transport; and suitable housing options. Across all of the issues mentioned there were common themes of affordablility, access and information.

Maori groups identified a number of specific issues. In relation to health services, these included access to information, a lack of cultural awareness and sensitivity among health organisations, and the cost and difficulty of access to general practitioners. Income support and intergenerational issues were also highlighted, and a call was made for more opportunities for older Maori to pass on their knowledge and skills to younger generations, as well as for positive ageing education programmes for younger people and greater recognition by government of the role and significance of kaumatua. A key theme that ran through the responses from Maori groups was the need for services to be provided "by Maori for Maori" (Senior Citizens Unit, 2001 p 30).

In general the consultation process seems to have allowed for a variety of voices to be heard. These included voices which drew on social democratic and progressive ideologies as well as Maori and Pacific discourses. On the other hand, no attempt seems to have been made to undertake an overt challenge of neoliberal and conservative ideologies. Following the consultation, in April 2001 the Minister for Senior Citizens launched the New Zealand *Positive Ageing Strategy*. This was followed six months later in October 2001 with the launching of a 'status report' which, among other things, identified issues requiring government action, as well as those already being addressed.

In presenting the Strategy, the Office for Senior Citizens argued that until recently much of the discussion of issues of ageing both in New Zealand and internationally had been focused on the problems and costs generated by the growing number and proportion of older people:

> The picture often painted is one of high dependency ratios, the potential tax burden imposed on working age people, and a large number of perceivably non-productive people (Office for Senior Citizens/Te Tari Kaumatua, 2002a p. 39).

In contrast, the Office for Senior Citizens advocated a positive theory of ageing and older people. It 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, 2002a p. 39).

It argued further that:

The ability to age positively is assisted by good investment in education to provide individuals with a range of skills and an ability to set and achieve goals. It is also dependent on an environment that provides opportunities for older people to remain involved in society (Office for Senior Citizens/Te Tari Kaumatua, 2002a p. 39).

In the light of the criticisms and suggestions made during the consultation, the following ten goals for the Strategy were identified: "To provide or ensure:

1. secure and adequate income for older people;
2. equitable, timely, affordable and accessible health services for older people;
3. affordable and appropriate housing options for older people;
4. affordable and accessible transport options for older people;
5. older people feel safe and secure and can 'age in place';
6. a range of culturally appropriate services allows choices for older people;
7. older people living in rural communities are not disadvantaged when accessing services;
8. people of all ages have positive attitudes to ageing and older people;
9. elimination of ageism and the promotion of flexible work options; and
10. increasing opportunities for personal growth and community participation" (Office for Senior Citizens/Te Tari Kaumatua, 2002a p. 39).

In apparent contrast to the statement of principles, the goals seem to incorporate more elements drawn from social democratic and progressive discourses. They provide a framework for involvement by the state in a number of areas including income maintenance, health, housing, transport and security issues. At the same time, presumably in order to de-politicise the Strategy, no attempt seems to have been made to highlight its social democratic agenda for action or to draw attention to the ideological differences underlying the Strategy.

On the other hand, when we examine the Strategy from within a social democratic and progressive discourse, it seems that the full potential of ACE's contribution remains unrealised. In the Strategy documents there is implicit recognition that most goals have an ACE dimension. For example, in the case of the first goal, if all older people are to have access to a secure and adequate income, the Strategy refers implicitly to at least two educational tasks: infoming people of entitlements and promoting informed debate and discussion (Ministry of Social Development / Te Manatu Whakahiato Ora, 2001). Similarly, with reference to the eighth and ninth goals, if people of all ages are to develop positive attitudes to ageing and older people and if we are to work towards the elimination of ageism in the workplace, there are clearly important ongoing personal and policy-related educational tasks to be undertaken.

However the implications of this are seldom recognised and the educational work implied remains undertheorised and largely unacknowledged and undervalued. A fully developed social democratic and progressive strategy would necessarily place greater weight on the important formal and nonformal educational elements embedded in most if not all of the goals. It would state that although none of the above goals can be achieved through education alone, few if any of them can be achieved without some forms of ACE for active citizenship supported by the state. This would entail clearer recognition that reflection and informed action by policy-makers and citizens is needed on a wide range of issues on a lifelong basis if the goals are to be achieved. This is necessarily an educational task involving two kinds of inter-related learning objectives:

- those focused on the personal circumstances of individuals (the personal); and
- those which address the formation and execution of relevant policies (the political).

Within social democratic and progressive discourses, a central purpose of ACE must be to bridge the gaps between these two forms of experience - knowledge and action - the personal and political (Mills, 1959; James, 1982; Leicester, Modgil, & Modgil, 2000; McClenaghan, 2000;). This recognition seems to be largely missing from the documents, and consequently the full potential for ACE within a social democratic and progressive discourse remained largely unrealised. As mentioned previously, this may be ascribed in part to the processes of 'depoliticisation' in developing the Strategy.

From the viewpoint of ACE, the most explicit and extensive references to education and older people were contained in the action plans relating to the tenth of the above goals. This goal focused on "increasing opportunities for personal growth and community participation" and the action plans linked with each of the goals referred to the following: "improve opportunities for education for all; implement adult education and retraining intiatives; encourage utilisation of the experience of older people; (and) promote and support volunteer organisations" (Ministry of Social Development / Te Manatu Whakahiato Ora, 2001 p. 104).

In summary the *Positive Ageing Strategy* recognises that ACE has an important contribution to make to the Strategy. It also seems to imply that the state should continue to be involved in supporting and promoting ACE. On the other hand, it does not contain any statement of government commitment to continuing support by the state for the range of ACE programmes that contribute to the *Positive Ageing Strategy*. Involvement by the state is implicit rather than explicit. Moreover the thinking about the role of education and older people does not contain the breadth of vision about these contributions that had characterised the 1987 report of the Ageing and Education Working Party (Ageing and Education Working Party, 1987; Tobias, 2005a pp. 9-11).

It may be argued that these limitations were not ideological but attributable to the fact that in 2001 the government was still developing its policies for tertiary education and ACE. The second part of this paper therefore addresses

this issue and investigates whether the limitations identified at that time have been addressed in the intervening period.

The Tertiary Education Advisory Commission
In the meantime, during its first year in office in 2000 the new government had given attention to reviewing every aspect of post-compulsory education. One of its earliest and most substantial initiatives involved setting up a Tertiary Education Advisory Commission (TEAC) to undertake a major review of tertiary education. By way of contrast with the reviews of the 1990s which had been dominated by neoliberal idelogies (Olssen, 2001; Tobias, 1997), the government drew on social democratic discourses and accorded a central role to lifelong learning in TEAC's terms of reference. Moreover TEAC itself, at least in its first two reports (Tertiary Education Advisory Commission, 2000, 2001c) located itself squarely within a social democratic discourse. Elsewhere (Tobias, 2004) I have examined the changes in discourses which took place in its first and final two reports (Tertiary Education Advisory Commission, 2001a, 2001b). These involved a shift from traditional or classical discourses of social democracy towards a 'modernised' social democratic or 'Third Way' discourse with increasing reliance on neoliberal and managerialist ideologies (Tobias, 2004 pp. 579-584).

'Koia! Koia!'
The only specific reference by TEAC to education of older people was made in its second report when it pointed to "a large sustained rise in the proportion of older persons over the next two decades, including the rise in numbers of older persons in the workforce" (Tertiary Education Advisory Commission, 2001c p. 16). Beyond this, however, it did not examine issues related to education and older people. It seems that it was expected that these issues would be addressed by other groups appointed by the government, and in particular, the Adult Education and Community Learning Working Party.

In July 2001 the report of this Working Party was published (Adult Education & Community Learning Working Party, 2001). Elsewhere (Tobias, 2002) I have summarised and critiqued this report. Here my focus is on those aspects directly relevant to education and older adults. Drawing primarily on social democratic discourses, the Working Party legitimated the diverse roles and objectives of ACE. Included are several references to the importance of education for older people. The report draws on a number of documents published by UNESCO, the OECD and other international organisations, identifies a range of public and private benefits of ACE, and points to the large enrolments in a variety of ACE programmes. With reference to older people's learning, it notes that the UNESCO-sponsored 1997 Hamburg Declaration (UNESCO, 1998) had highlighted,

> the role of adult education in helping different groups, such as people with disabilities, migrants and older people to realise their aspirations; ensuring access to work-related adult learning for different target groups; and in enhancing international co-operation and solidarity (Adult Education & Community Learning Working Party, 2001 p.12).

The report then draws attention to the roles 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. It includes a review of research, and one section of this identifies selected studies which point to the benefits of educational participation for positive ageing (p. 66). Several studies are cited which identify a growing body of research which find that lifelong learning, participation in adult education, as well as other forms of social engagement and productive activity, are essential features of successful and positive ageing. It argues that:

> An ageing population will need ways of maintaining their sense of connection and usefulness to society. ACE has always played an important role for this section of the population. It has provided a wide range of learning opportunities and it has also allowed older people to teach or tutor, often on a one-to-one or voluntary basis, thereby sharing their knowledge and skills with others (p. 14).

The report argues 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" (p. 29).

It identifies the following goals as essential to a revitalised ACE sector: statutory and administrative recognition by the state of the importance of the ACE sector; more adequate recognition and funding of voluntary organisations and community groups; greater levels of ACE participation by Mäori people who should retain control of their knowledge bases; a secure funding framework which would ensure equity between organisations, responsiveness to those in greatest need, encouragement of innovations, and public accountability; and the capacity of ACE to be strengthened through research, professional development, guidance and referral.

Overall, it seems that *'Koia! Koia!* and decisions emerging from it were grounded in social democratic and progressive discourses. The individualistic market-driven model of education was rejected, and it was determined that the state should maintain financial support for ACE as a whole, increasing its funding of voluntary organisations and community groups, which had been starved of state funds during the decade of neoliberal dominance in the 1990s. On the other hand, my critique of the report at the time (Tobias, 2002) was that it was unduly modest in its claims on the state for financial support. Moreover it still contains elements of the kinds of welfarism and managerialism associated with the 'modernised' social democratic or 'Third Way' discourse that had emerged in the later reports of TEAC in 2001.

Policy development, 2002-2005

Tertiary education legislation and the first Tertiary Education Strategy
In December 2001 the government had promulgated the Tertiary Education Reform Bill (New Zealand Government, 2001). To understand the changes

made to educational policies directly affecting older people, it is necessary to discuss briefly the wider changes in tertiary education. The Tertiary Education Reform Bill was intended to give effect to the government's decisions on the reform of the tertiary education system as a whole. It was based on the recommendations of the first two TEAC reports. Its stated purpose was "to reshape the tertiary education sector to achieve greater coherence between different parts of the sector and more strategic use of resources" (p 3).

This was to be achieved by the following means. Firstly, a Tertiary Education Commission (TEC) was to be established, with responsibility for giving effect to the Government's priorities by negotiating charters and profiles with organisations and allocating funds to and building the capability of organisations. The TEC's responsibilities covered all aspects of tertiary education. Secondly, the Minister of Education was to issue a *Tertiary Education Strategy* (TES) to be approved and presented to parliament, and a *Statement of Tertiary Education Priorities* (STEP) setting out the government's priorities for tertiary education. The TEC was also to be responsible for giving advice to the Minister on matters related to these two documents. Thirdly, requirements for organisational charters were to be extended, and organisational profiles were to be introduced with a view to strengthening the TECs and the Minister's capacity to 'steer the tertiary education sector'. Fourthly, a new approach to state funding for the sector as a whole was to be set in place to create consistency in the use of criteria and mechanisms for funding organisations across the entire tertiary education sector, as well as to secure the strategic use of state resources. Finally, the New Zealand Qualifications Authority was to have the authority to regulate and suspend accreditations, course approvals, and registrations.

It took much longer than anticipated to enact the new legislation. Delays in parliament during the first six months of 2002 were followed in August 2002 by an early general election. A Labour-led Government was once again elected, with the support of the Progressives and United Future. As a consequence of the delays it was not until December 2002 - a year after it had been introduced into parliament - that the Education (Tertiary Reform) Amendment Act of 2002 (New Zealand Government, 2002) was finally passed. Most of the provisions contained in the original bill remain in the final version, and on 1 January 2003 the Tertiary Education Commission (TEC) came into existence.

In the meantime, in May 2002, the government had published the first *Tertiary Education Strategy* (TES) for the five year period from 2002 to 2007 (Office of the Associate Minister of Education (Tertiary Education), 2002). This document summarised the key elements of the comprehensive programme of tertiary education reforms as described above. It drew on the work of the Ministry of Social Development (Ministry of Social Policy, 2001), and identified five key trends in New Zealand society which would affect teritary education. These included: evidence of increasing fragmentation of families and communities, the current 'digital divide' and other barriers to inclusion, the impact of globalisation, and current demographic changes leading firstly to the increasing predominance in New Zealand of Mäori and Pacific peoples and

secondly to an increase in older people. The document stated that, "This will influence the nature of work, retirement and leisure, and will require a greater focus on educating an older, existing workforce" (Ministry of Social Policy, 2001 p.14).

The TES then described the six strategies to be pursued over the following five years:

1. "national goals cannot be achieved unless the strategic capability and robustness of the tertiary education system as a whole is enhanced" (Office of the Associate Minister of Education (Tertiary Education), 2002 p. 16);

2. there was a "need to recognise the unique position of Mäori as Treaty partners, and the huge significance that learning and education has for Mäori communities" (p.16);

3. "improving foundation skills (literacy, numeracy and other basic skills), will ensure that more New Zealanders are able to participate effectively in the economic and social benefits of our vision for national development" (p.16);

4. "we will need high-level generic skills in much of the populace, and more highly-specialist skills in areas of comparative advantage, for New Zealand to accelerate its transformation into a knowledge society" (p.16);

5. "this strategy addresses issues relating to Pacific peoples' capability needs and skill development that will ensure their success and development" (p.16);

6. the strategy "recognises that research and innovation are key drivers of modern economies, and also that the broader application of new knowledge will enable the achievement of social, environmental and structural goals" (p.16).

The TES for the period 2002-7 is located in a social democratic discourse. It rejects, or at least modifies substantially, the highly competitive neoliberal model of tertiary education which had dominated the 1990s, and it addresses specific issues of equity and inequality among Mäori and Pacific people. It looks to tertiary education to make a contribution to such goals as greater equality and strengthening the knowledge-based economy and society. However its social democracy is a modernised one closely linked with 'third way' discourses. It thus remains grounded in a commitment to a market-driven, individualistic model of society to which tertiary education in its various forms (both public and private) will contribute by providing people with diverse skills and knowledge. While not explicitly endorsing the role of tertiary education in supporting global capitalism to the extent that some 'third way' advocates have done (Giddens, 2000), the TES does not seek to challenge that model. Moreover the TES contains no evidence to suggest that the government is committed to the task of providing tertiary education for critical consciousness.

ACE policy development, 2003-5
With the establishment of the TEC on 1 January 2003, responsibility for ACE moved from the Ministry of Education to the new Commission. Almost immediately, in January of that year, the TEC established an Adult and Community Education Reference Group. The constitution of this group differed from that of the ACE Board as recommended by the Adult and Community Education Working Party, and this seems to reflect a significant

shift in the discourses underlying the new structures. Drawing on social democratic discourses, the working party had recommended that the ACE Board should be a statutory one, with wide powers to enable it to provide leadership and advice to the TEC itself. Its members were, initially at any rate, to be appointed by the Miinister of Education from nominations received from the sector. By way of contrast, managerialist discourses seem to underlie the establishment of the new Reference Group. It was set up as an advisory group to the TEC management rather than the Commission, it had no statutory powers, and its members were appointed by the TEC management on the basis of nominations from the sector.

The functions of the Reference Group were to

> advise on the most effective and efficient means to implement the recommendations made in the ACE working party report and subsequently endorsed by government, identify *s*trategic issues involving adult and community education and advise on their implications in respect of the Tertiary Education Strategy and the Statement of *Tertiary Education Priorities*; advise how such issues might be considered and addressed by the TEC; and assist TEC to develop and maintain relationships and communications with the ACE sector (Tertiary Education Commission, 2003 p. 1).

In March 2003 the government announced its decision that the priorities for future state funding for ACE were as follows:

- targeting priority learner groups (including those whose initial learning was not successful);
- raising foundation skills;
- strengthening communities by meeting identified community learning needs;
- encouraging lifelong learning; and
- strengthening social cohesion (Tertiary Education Commission Te Amorangi Mātauranga Matua, 2005b).

The TEC was to take over the funding of schools-based community education as well as the ACE component of REAP funding. In addition the TEC was giving advice to ACE providers on relevant aspects in the development of *charters* and *profiles* since it was on the basis of these that organisations would in future be funded. From 2005 ACE funded provision would be aligned with the above-mentioned priorities and principles. Finally, it was stated that the ACE fund, ACE outcomes and associated performance indicators were the subject of a Ministry of Education cabinet paper that was in its final draft stage (Tertiary Education Commission, 2003 p. 3). It was not immediately apparent how the provision of education about ageing or for older people would fare under the new framework.

In March 2005 the TEC issued a consultation document entitled *A Funding Framework for Adult and Community Education* (Tertiary Education Commission Te Amorangi Mātauranga Matua, 2005a). In this the TEC stated that government had directed that ACE funding should move away from a model based on 'type of provider' to one based on the type of provision and

the learning outcomes being delivered; that it should be provided through a single funding framework; and that it should support programmes and activities on the basis of their alignment with ACE priorities. It then set out a range of options for funding within a framework which accorded with government decisions made since the publication of the *Adult Education Working Party's* 2002 report. Elsewhere (Tobias, 2005b) I have reviewed this consultation document in some detail.

The body of the document itself makes no explicit reference to education about ageing or for older adults. However it does seem that the proposed funding framework is intended to provide for greater state funding of ACE programmes addressing such areas. Evidence for this is contained in Appendix 6 of the document (pp. 52-54). This includes templates for three proposed summary reports to be completed by agencies and organisations funded by the state to provide ACE programmes. Two of these templates are for summary reports enabling providers to classify programmes as having a direct focus, or a high impact, or a moderate/incidental impact on one of the priority areas.

It is worth highlighting the nature of the third template. This is for a summary report on programmes to be classified by broad subject areas as follows: literacy, numeracy and language; public/community good issues; and community development; cultural traditions; personal skills; computing; personal interest activities; and work and education. The template describes and gives examples of programmes in each of the seven areas, and in the public/community good issues and community development subject areas it states that this refers to courses and activities whose primary goals are the development of individual and community skills, understanding and action to support social cohesion and community development. It goes on:

> The activities are likely to be related to issues and activities such as: citizenship, democracy, racism, poverty, violence, peace, ageing, environmental sustainability, health, economic development, community development, management of community organisations, technological change (Tertiary Education Commission Te Amorangi Matauranga Matua, 2005, pp52-54).

Thus, the document draws on social democratic and progressive discourses to make explicit its recognition of the important role to be played by the state in supporting and promoting adult education for active citizenship and in particular in relation to issues concerning ageing.

In July 2005 in a letter to ACE stakeholders, Janice Shiner the Chief Executive of TEC announced that the government would introduce a new funding framework for ACE to ensure that all ACE funding is locally allocated to align with the national ACE priorities (Shiner, 2005). She also announced that from 2007 this framework would apply to all ACE providers: state secondary schools, REAPS, the Correspondence School, national ACE providers, small community providers and tertiary education institutions; that all providers would participate in the local ACE Networks which would play a key role in

funding decisions; and that an integrated fund of $45 million would operate from 2007.

This is a funding framework which allows for the funding of educational programmes relevant to ageism and older people, rather than addressing these as special issues or priorities. There is therefore still no certainty for the future for these forms of education. It is a framework which is congruent with the recommendations of *Koia! Koia!*. Thus there remains a welfarist and managerialist element to the framework. It is, however, located predominantly in a traditional social democratic and progressive discourse. As such it fits well with government rhetoric and with the earlier reports of TEAC, but somewhat less easily with the more pragmatic and individualistic discourses characteristic of TEAC's later reports and of many other aspects of the tertiary funding framework (Tobias, 2004 pp. 583-4).

Whether or not the ACE funding framework serves the interests of older people from working class backgrounds and whether or not it achieves the progressive aims expected of it in a tradional social democratic discourse will hinge on a number of factors. These include questions about whether the competitive tendencies inherent within the local networks can be effectively constrained, what priorities the various networks give to education about ageism and for older people, and whether future governments maintain the level of state funding available to ACE networks for distribution to the field. The managerialism inherent in the structure suggests that ACE may in future be more susceptible to political control than it has been in the past.

Positive Ageing Strategy, 2002-2005

Each year since 2001 an Action Plan and an Annual Report on the *Positive Ageing Strategy* have been published by the Office for Senior Citizens. These have included plans and reports from a large and steadily growing number of government agencies. For example, the Action Plan and Report for 2002-3 identified 134 projects or work items contributing to the Strategy across 32 government portfolios or agencies (Office for Senior Citizens/Te Tari Kaumatua, 2002b, 2003b). The most recent Action Plan, for 2005-2006, described 193 work items or projects to be undertaken by 56 agencies including 17 local authorities (Office for Senior Citizens/Te Tari Kaumatua, 2005b). Overall, then, there has been a steady increase in the number of projects (from 134 to 193) and agencies (from 32 to 56) involved in the Strategy over the period.

As mentioned previously, many of these projects had an ACE dimension. But as mentioned previously, more often than not the ACE dimension of projects was implicit rather than explicit. Explicit references to education were contained in the sections of *Positive Ageing Strategy* action plans and reports contributed initially by the Ministry of Education and from 2004 by the Ministry and the TEC. In its report for 2002-2003 the Ministry of Education identified a number of achievements in ACE and adult literacy. These included:

- publication in August 2002 of a booklet entitled 'Life is ACE' profiling adult learners;
- conclusion in late-2002 of the trial of Charters and Profiles;
- piloting of ACE networks including University of the Third Age, Age Concern and SeniorNet;
- establishing an ACE Reference Group in March 2003; and
- cabinet agreement in March 2003 to a new funding framework for ACE. Under this framework, encouraging lifelong learning is one of several national priorities for ACE (Office for Senior Citizens/Te Tari Kaumatua, 2003b p. 15).

In its 2003-4 Report the Ministry of Education also identified a project aimed at collecting information about older people's participation in tertiary education as part of the access and participation strategy. The Ministry identified the following two achievements under the overall heading of 'Enabling lifelong learning' over the period:
- "Senior citizens participated in formal tertiary education in greater numbers than ever in 2003, with 4,633 students aged 65 or over, making up 1% of the total student population, compared with 542 (or 0.2%) in 1998"; and
- "Adult and community education (ACE) was an important source of learning opportunities for senior citizens, with approximately 18,000 over the age of 60 participating in ACE through schools in 2003, making up almost 9% of learners in these programmes" (Office for Senior Citizens/Te Tari Kaumatua, 2004b p. 13).

In the most recent annual report for 2004-2005, under the overall heading of 'Enabling lifelong learning' the Ministry of Education combined with the TEC to report further on the project referred to the previous year which aimed to "improve access to education for older people". It reported on the following for the 2004-2005 year: When compared with 2002 and 2003 data
- participation by students aged 65+ in tertiary eduction increased by 59%;
- as a proportion of all students, participation by students aged 65+ rose from 0.7% in 2002 to 1.1% in 2003;
- participation by Maori aged 65+ in tertiary education increased by 26%;
- participation by Pacific peoples in tertiary education aged 65+ increased by 59%;
- participation by students aged 65+ in ACE courses at Tertiary Education Institutions (TEIs) increased by 97%'.
- As a proportion of all students enrolled in ACE and TEIs participation by students aged 65+ increased from 7.7% in 2002 to 8.0% in 2003' (Office for Senior Citizens/Te Tari Kaumatua, 2005c p. 13).

These figures, together with those reported in the previous year's annual report, suggest a significant increase in the number and proportion of people aged 65 and over participating in tertiary education. They also suggest that those 65 and over constitute a growing proportion of all tertiary students.

Perhaps more important than this, however, is the fact that apparently for the first time since the 1970s (Bird & Fenwick, 1981; Tobias, 1991a), data were being gathered to enable researchers and policy-makers to track the educational participation of older people. An entire chapter of the Ministry's annual Profile and Trends publication in 2004 was devoted to participation by older people in tertiary education (Ministry of Education, 2004).

However, the contribution of the Ministry of Education and the TES to the *Positive Ageing Strategy* seems to have been quite limited. Moreover, little change seems to be envisaged in the current *Action Plan*. Although the overall objective is stated as that of improving "access to education for older people", the focus is exclusively on gathering "data on older people's participation in tertiary education from tertiary providers for the purpose of monitoring and publication in the Ministry of Education's Profile and Trends statistical report" (Office for Senior Citizens/Te Tari Kaumatua, 2005b p. 14). There is little evidence of leadership leading to progressive changes.

Other government departments contributed a number of initiatives. The Accident Compensation Commission set up a Positive Ageing Reference Group to act as a forum for issues relating to ageing and as a contribution to the goal that people of all ages should have positive attitudes to ageing and older people. Archives NZ established projects to "provide a learning resource for older people by preserving and enabling access to governmental records of enduring value [and to)] allow older people to explore the stories of their own past and the past of our society as a whole, and to contribute to the nation's knowledge through production of published histories" (Office for Senior Citizens/Te Tari Kaumatua, 2002b p. 3). The Ministry for Arts, Culture and Heritage reported on several projects. These included the work of its History Group and its ongoing support for its oral history project.

The Department of Internal Affairs has had a significant role over the years. The Community Organisations Grant Scheme (COGS) it set up in the 1980s and administers continues to contribute to greater "social, cultural and economic justice for communities, including older New Zealanders" (Office for Senior Citizens/Te Tari Kaumatua, 2002b p. 22). The Department also administers *Lottery Seniors* funding which aims to "enable older New Zealanders to engage in active, educational and positive activity in their communities by funding communities and the not-for-profit sector for appropriate programmes" (Office for Senior Citizens/Te Tari Kaumatua, 2002b p. 23).

Several projects run by the Ministry of Health have an educational dimension. These include information programmes so that carers of older people receive more adequate training and support, and the development of an 'older people's' webpage on the Ministry's website. Through its Labour Market Policy, Community Employment and Workplace Groups and the Equal Employment Opportunities Trust, the Department of Labour reports on its employment initiatives, *Future of Work* and *Closing the Digital Divide* projects, all of which focused inter alia on the experience of and impact on

older people as well as efforts to find solutions to issues relating to the ageing workforce including the promotion of flexible work options.

Through the *Office for Senior Citzens*, the Ministry for Social Development reported on projects to promote and support intergenerational understanding and to facilitate older people's engagement in various local and national policy developments. Through its Family and Community Services and the Office of the Retirement Commissioner, the Ministry facilitated projects that support volunteers and volunteerism, strategic leadership initiatives across the local community level through SAGES – older people as mentors services - and a dedicated website for older people.

As far as lifelong learning and older people are concerned, there is some evidence to suggest that the *Office for Senior Citizens* is still influenced by neoliberal discourses and an ideology which links learning priorities primarily with the demands of the labour market and the need to keep older people in gainful activity for longer. In its important September 2005 Briefing Papers for the Incoming Minister, the only references to education and learning are in paragraphs devoted to: (a) the need to encourage people to save for retirement, and thus ".. to educate the New Zealand public about financial management and retirement planning" (Office for Senior Citizens/Te Tari Kaumatua, 2005a p. 35); and (b) the need to recognise that "active ageing requires flexible work patterns" and hence provide the choice to work later in life.

In this context, under the heading, 'Lifelong learning and the option to work past the age of 65 are central to positive ageing', the Office for Senior Citizens states:

> Research findings suggest that those who work longer, either paid or unpaid, enjoy better health in their older age. The policy conclusion is clear: it is imperative to maintain people in gainful activity longer. To achieve this objective, more emphasis must be given to lifelong learning for workers of all ages, so that workers maintain and increase their skills and productivity as they grow older (Office for Senior Citizens/Te Tari Kaumatua, 2005a p. 32).

Moreover, there appears to be little recognition by the Ministry or the TEC of the kinds of educational contributions that could be made to the *Positive Ageing Strategy*. The recommendations of such groups as the *Ageing and Education Working Party*, which almost 20 years ago drew on social democratic and progressive discourses to identify some of these contributions (Ageing and Education Working Party, 1987; Tobias, 2005a pp. 9-11), seem to have been largely forgotten. And no new groups with such a focus have been extablished in recent times.

Conclusion

This article tells the story of the development of policies relevant to education, ageism and older adults as recommended and reported on by agencies of the state betweeen 1999 and 2005. The story is located in the context of ongoing

historical struggles between competing discourses and the article has discussed their impact on tertiary education, ACE and the place of older people in society.

By way of contrast with the 1990s during which neoliberalism and pragmatic conservatism held sway, this article suggests that the period from 2000 to 2005 saw the renewal of social democratic and progressive discourses and in particular the rise of a 'modernised' or 'third way' form of social democracy with its emphasis on managerialism and welfarism.

In this context the article suggests that a policy framework has been developed which: (a) has led to the establishment of a number of projects relevant to education, ageism and older adults as part of the newly established *Positive Ageing Strategy*; and (b) holds out the possiblity that the educational interests of older people from working class backgrounds, including Mäori and Pacific people, refugees and other minorities, as well as people from working class Pakeha backgrounds may be served more effectively than in the past. The article also suggests, however, that these achievements remain fragile. In the light of ongoing struggles there is no certainty that these achievements will be sustained in the future.

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