

# Building a Strategic Framework for Lifelong Learning: insights from ‘Learning Through Life’ .

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## Introduction

“from the earth of farm labour to the heaven of education...”

(Seamus Heaney)

This paper gives an overview of the work of the recent independent Inquiry into the Future for Lifelong Learning in the UK. I first outline the range of the Inquiry, to give an idea of the overall context; this includes its application in each of the regions within the UK ( England, Scotland, Wales and Northern Ireland.) . I turn then to two sets of theoretical frameworks which underpin the report: the interlinked notions of human, social and identity capital; and, more originally, the four-stage model of the lifecourse. I outline the way in which resources are allocated across the different stages. I then discuss the notion of intergenerational solidarity, by considering the types of transfers which run between generations. The sections provide only a selection of insights; for a fuller account readers are referred to the main report of the Inquiry, *Learning Through Life*.

## Strategic approaches

The Inquiry into the Future for Lifelong Learning (IFLL) was an independent inquiry, sponsored by NIACE, the National Institute of Adult Continuing Education, and carried out from 2007-2009<sup>6</sup>. The origins of the Inquiry lay in the setting up, a decade previously, of the National Advisory Group on Continuing Education and Lifelong Learning. David Blunkett, Secretary of State for Education and Skills for the new Labour Government, gave this advi-

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<sup>6</sup> NIACE's remit covers England and Wales, but the Inquiry extended to include Scotland and Northern Ireland, in ways I shall describe below.

sory group a wide brief, and himself wrote an inspiring Foreword to the report which resulted, *The Learning Age* (DfEE 1998). In it he gave full recognition to the need for civic and cultural learning, in addition to more functional dimensions. However over the succeeding years the political focus gradually narrowed, with an increasing emphasis on work-related skills. In 2007, the Chief Executive, Alan Tuckett, - asked the NIACE board to allocate resources to an investigation which was intended to kickstart a fresh debate, and political action, on the broader themes of lifelong learning. NIACE is a medium-sized charity, and this was a very significant commitment on their part. The Inquiry was steered by a body of Commissioners, chaired by Sir David Watson, who were invited to produce their own thoughts and recommendations<sup>7</sup>. The overall goal of the Inquiry was specified as follows: to offer an authoritative and coherent strategic framework for lifelong learning in the UK. This was understood to involve:

- articulating a broad rationale for public and private investment in lifelong learning;
- a re-appraisal of the social and cultural value attached to it by policy-makers and the public;
- developing new perspectives on policy and practice.

Adhering to the goal of a strategic framework presented some problems. It necessarily entailed adopting a longer-term horizon than generally characterises policy-making; but in doing so it risked distancing itself from the immediate concerns of practitioners in the field. There is a particular difficulty in the case of lifelong learning, since the 'system' itself is untidy and diffuse, and not easily amenable to coherent discussion.

Secondly, it raised issues to do with the nature of research, evidence and analysis. Developing a strategic framework is an applied exercise. This does not exclude critical thinking, nor theorising; but it means that the main thrust of the arguments is towards a framework which is useful for policy-making and application, at different levels.

Thirdly, there is a difficulty of language. Discussions and documents which claim to be 'strategic' tend to the grandiose or the banal, and often do not invite

<sup>7</sup> There was strong overlap with the sponsoring body, in that two of the Commissioners were members of the NIACE Board; Alan Tuckett attended throughout; and the IFL Secretariat were NIACE staff, either appointed directly to the Inquiry or seconded. However this overlap generated no significant threat to the Inquiry's independence.

engaged debate. A key test for the Inquiry has been whether it could manage to maintain a strategic focus without floating off into the stratosphere. Readers will have to judge this for themselves.

### Structure and strands

The remit of the Inquiry was very broad. It was initially structured around nine main themes:

- Employment
- Demography
- Wellbeing
- Technology
- Migration
- Crime
- Poverty
- Citizenship
- Sustainable development.

For each of these themes we issued a Call for Evidence. This was followed by a day-long seminar, with contributed papers by researchers and practitioners. These elements were then fused into a Thematic Paper, drawing together the various inputs and taking the theme on towards a set of conclusions.

### However, there were a significant number of other inputs:

- *Sector papers* were commissioned. These explored the implications of a genuine move towards lifelong learning for each of a number of sectors, both inside and outside the formal education system. The papers cover: early years, schools, further education, higher education, the private training market, cultural institutions (museums and libraries) and family learning.
- *Stocktake*. This strand had two major components. First, we commissioned extensive work to map out the range of investments made in different forms of lifelong learning. This was painstaking, original work, building up the figures from the bottom up. The figures cover expenditure by government departments, both as employers on their own staff training and on broader programmes; by local government and other public agencies; by private employers; by the third sector; and by private households and individuals. We estimate the annual total of public and private expenditure at some GBP £55 billion. (approx €50 billion).

Secondly, we brought together existing data on participation in adult learning, mainly from NIACE's own regular annual surveys. This enabled us to show trends over the last decade.

Bringing these two components together turned out to be a crucial factor in the overall shape of the Inquiry's conclusions. In proposing a new four-stage model of the educational lifecourse, we were able to show how the total resources were distributed across the different stages. By combining the population participation rates at each stage with the different levels of per capita expenditure we were able to show how disproportionate the distribution is.

- Thirdly, we commissioned some analysis of the public value of lifelong learning, that is to say the ways in which learning affects wider areas of public policy. We focussed in this strand on poverty, crime, health and wellbeing. An important goal here was to open up methodological issues involved in such analyses, in an attempt to build stronger bridges between conventional cost-benefit analysis and the types of analysis which recognise wider factors and more complex social interactions. We built here directly on the work of the Research Centre into the Wider Benefits of Learning ([www.learningbenefits.net](http://www.learningbenefits.net); see especially Feinstein 2008; and Schuller et al 2004), and indeed collaborated with colleagues from the WBL Centre on this.
- Finally, we carried out an electronic consultative exercise on *learning infrastructures*. In this we focussed on the interactions between physical environments and spaces on the one hand and technological developments on the other; and the skills required to make such interactions work most effectively to the benefit of learners. Two rounds of consultation took place involving educational technologists, planners, architects, and various other categories of professionals. This exercise resulted in a number of scenarios, built round a set of drivers.

The papers from these strands are all available on the IFLL website: [www.life-longlearninginquiry.org.uk](http://www.life-longlearninginquiry.org.uk). They are a rich resource. However the rest of this article draws primarily on the Inquiry's main report, *Learning Through Life* (Schuller & Watson 2009), launched in September 2009. First, however, I would like to say a few words on the way in which the Inquiry addressed the complexities of the political structures of the UK.

### **A UK Inquiry: the regional dimension**

Readers of this journal will be well aware of the asymmetrical nature of the UK's political structure, and within that of the divergences in education and training systems. The Inquiry set out to draw on the experience of the four UK regions, and to produce findings which would be of relevance to each of them. This was no easy task. We developed two main means of tackling it<sup>8</sup>.

First, we held day-long seminars in Wales, Scotland and Northern Ireland. These allowed us to capture some of the key strategic issues from the different regions, even though we would not claim to have covered the full range of their particular contexts. In Wales, for example, the question of partnerships was very strong; in Scotland we dealt extensively with the issue of credit frameworks; and in Northern Ireland the broad topic of community cohesion was the dominant theme of the day. Secondly, we commissioned individuals to 'proof' the text of *Learning Through Life* (LTL) from a national perspective (Gallacher 2009, Nolan 2009).

Following the publication of LTL we have engaged in several meetings in the different nations. These have been lively and productive, and, subjectively at least, the feeling seems to be that the report speaks to the concerns in the different regions of the UK, although with necessary adjustments of emphasis.

In this context it is worth adding that there is mounting interest from other countries in the Inquiry's process, analysis and recommendations. In spite of the fact that LTL focuses very much on the UK, researchers and policy-makers in several other countries, for example Canada, Italy and Denmark, have responded by saying that they have no difficulty in applying the framework to their own contexts.

### **Mobilising concepts**

The strategic framework drew on two conceptual sources. The first brought together three 'capitals' – human, social and identity – and built on work already done (Schuller et al 2004). The second was a new approach to modelling the educational lifecourse, dividing it into four stages.

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<sup>8</sup> We had a Commissioner from Wales, Professor Teresa Rees, and one from Scotland, Professor John Field, but their role was not at all confined to providing respective national perspectives.

### a) *Three capitals*

There is a growing consensus on the need for fresh thinking about the role of education in economic and social development, to get beyond simplistic reliance on single measures (such as a growth in qualifications as the sole driver) and to capture the complex interactions between the different components. We drew on a simple (but not simplistic) framework for thinking about the purposes and benefits of lifelong learning. This consists of three ‘capitals’, that is, forms of assets which have value for individuals and for society: human capital, social capital and identity capital.

- *Human capital* refers to the skills and qualifications held by individuals. It is built up mainly through formal education and training, but informal learning also plays an important part. People deploy their human capital in the workplace as a factor of production, but they also put it to use in social and community contexts.
- *Social capital* refers to participation in networks where values are shared, so that the people contribute to common goals. The networks may be local (including family) or global. It is less of a personal attribute than human and identity capital. Social capital supports learning and is strengthened by it. Although social capital is not acquired directly through education in the same way as skills and qualifications are, getting more education is a powerful way of increasing access to networks<sup>9</sup>.
- *Identity capital* is the ability to maintain healthy self-esteem, and a sense of meaning and purpose in life. As a Nordic thinktank discussing Future Competencies put it, adult education should enable people ‘to deepen their self-knowledge and reinforce their self-image, as this is the basis for effective competence development in other fields.’

There is a long-running debate about these terms: how they should be defined, and how they should and should not be used. The key issue is the interdependence of different kinds of learning. This is not just a conceptual matter. It affects policy and practice in very basic ways. Think of these capitals as forming a triangle, with the three sides linking up the different forms of capital. Without the formal and informal networks which make up social capital, people will find it hard both to build up the skills and qualifications which make up human

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<sup>9</sup> The notion of social capital in relation to education really took off with the publication of a major report by OECD in 2001, authored by Tom Healy.

<sup>10</sup> Nordic Network for Adult Learning (2007).

capital, and to apply them productively. Conversely, without skills, they will find it harder to gain access to networks. Without the self-esteem which makes up identity capital, it is difficult both to learn and to apply that learning.

Take as an illustration the relationship between education and depression. Depression is now a major form of ill-health, across most industrial nations, with one in five adults in the UK thought to be affected by depression at some point in their lives. It affects adults and children of all classes. Depression has a major impact on productivity, reducing the value of people’s contribution at enormous cost to organisations and societies, as well as individuals. It is linked to the extent to which people are part of thriving social networks: being a part of a network will help prevent or cure depression, and this includes work-related collegiality, as well as social relations outside the workplace. In turn, work that is unhealthy will have an impact on family and social relationships. The arrows go in all directions, linking each of the three capitals in both directions. This is common sense, but too often our approach to learning is based on splitting these different forms off from each other.

As assets the capitals have different implications according to their specific contexts. In particular, they have different meanings for different broad age groups (see below). Identity capital, for example, will have a very different significance for a young person seeking to establish their professional identity than it will for an old person confronting death. Both sets of circumstances are important – and both need access to learning.

### b) *A new model of the lifecourse*

The overall IFLL analysis was driven by two major trends: demographic change, especially the ageing of the UK population; and labour market change, especially the extension and increasing fuzziness of both entry into employment and exit from it. The combination of these two trends led us to formulate a fresh approach to the lifecourse. We draw three ‘bright lines’, at 25, 50 and 75. (‘Bright lines’ is a legal term, referring to divisions which are based on reasonable empirical assumptions, even though they make no claim to be universal or watertight.) These three lines give us four quarters: up to 25; 25-50; 50-75 and 75+<sup>11</sup>.

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<sup>11</sup> Being concerned primarily with adults, we define the first stage as 18-25.

The demographic picture is quite well known, but this does not mean the consequences have been properly assessed. Increased longevity means that the size of older age groups is increasing relatively quickly; the fastest growing group are the very old, but the largest increase in the next decade will be the over 50. So the shape of the population is changing. This poses significant economic and social challenges; our case is that the educational response to these has been very muted. Learning for people over 50 is still regarded as a peripheral issue.

The time taken by young people to move into the established labour market has been becoming not only longer but fuzzier. The work of Andy Furlong has shown how young people shift around between different statuses: full-time and part-time study, full-time and part-time work, unemployment: the sequences are myriad (Furlong et al 2003). It is only around their mid-20s that many young people establish a personal and professional identity. This is, evidently, a large generalisation, but one that is in broad terms empirically sustainable.

At the other end, some people begin to leave employment in their 50s. On the other hand, people are now working longer and longer. Data from the Longitudinal Survey of Adults in England shows how people in all older age groups increased their labour market participation between 2002/3 and 2006/7; for example the rate for 60-64 year olds went up from 37.8% to 45.5% (Banks and Tetlow 2009), and this is set to continue as a result of people having to work longer to meet increasing pensions deficits. As well as paid work, older people also engage a lot in voluntary work, with around 40% of those aged 65-74 engaged in informal volunteering. So we have some kind of mirror image of the youth transition, with older people engaging in a range of different activities, paid and unpaid.

At around 75 – another generalisation, but broadly true – is when chronic illnesses kick in. Almost everyone has by then withdrawn from the labour market, and a majority experiences some degree of dependency. This does not, however, mean that they have no learning needs.

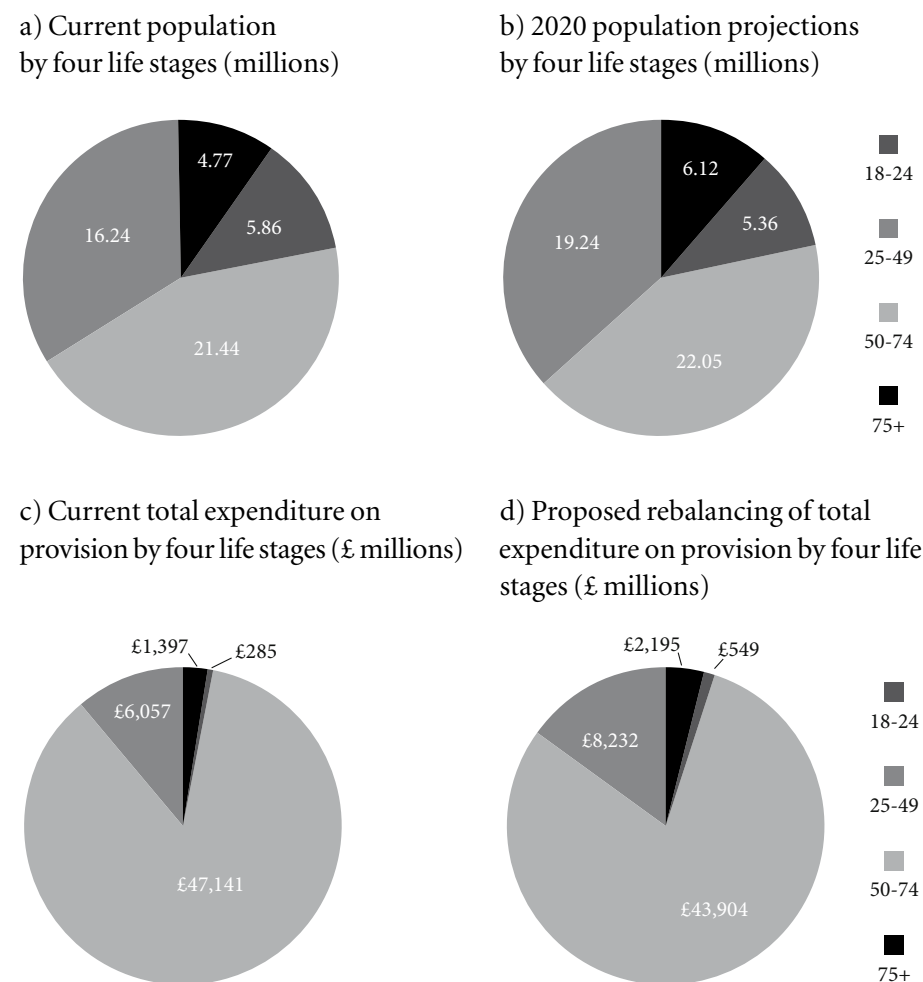
This forms the rationale for our four-stage model (for further detail see LTL Ch 5). Rather than being a neat theoretical construct, it is a recategorisation with direct application to the way we organise learning opportunities across the lifecourse. It poses a direct challenge to many assumptions about what and how people learn.

### Resources for learning

As noted above, we estimated the annual total of public and private spending on all forms of lifelong learning at £55bn. We developed a formula for analysing the distribution of this across our four stages. The formula was based on a combination of age-based participation rates and estimates of the duration of learning by age – ie how long different age groups spent on learning when they took part.

**Figure 1**

a) Current population and b) 2020 population projections (millions)  
 c) current total expenditure on provision and d) proposed rebalancing (£ millions)



The left hand side of Fig 1 (ie pies a and c) gives the result for the current population and expenditure. The right hand side shows how the population is projected to change (pie b) and how resources might be 'rebalanced' to reflect this (pie d), in order to give a more appropriate allocation. There is no intrinsic rationale to the precise figures in the rebalancing, with the reduction from 86% to 80% of the proportion going to those in the first stage and a consequent more than doubling of the resource going to the last two stages. We put it forward as a meaningful proposal to guide the future debate. If this is given the attention it deserves, it will do much to achieve a major expansion of learning opportunities across the life-course.

### Intergenerational solidarity

Having set out the four-stage model, we go on to emphasise that this is not designed to confine individuals to different age groups, nor is it to suggest that learning should be organised on that basis. Social structures do not mean placing people in different boxes as if they all conform to identical patterns. Nevertheless, the way we have constructed the argument, and the rationale for a rebalancing of resources across the different stages, could be taken as accentuating divergences and tensions between different age groups and generations. In this section, therefore, I sketch out how the interests of different generations are interdependent, even whilst there is inevitable competition for resources.

Figure 2

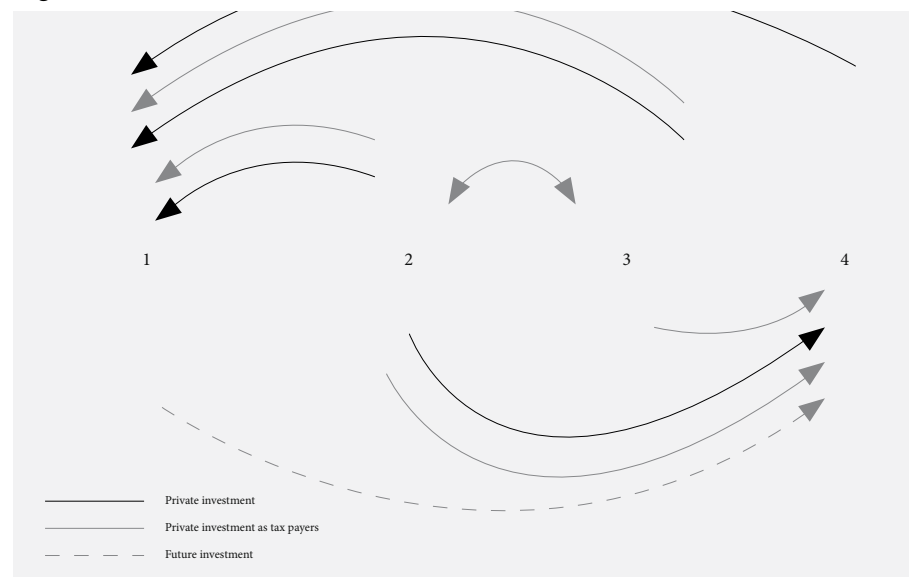


Figure 2 outlines the different types of linkages between generations which underpin investment in lifelong learning. For example, grandparents often invest in the schooling or university study of their grandchildren, either through paying fees or through supporting the young generation in other ways. Those in the Fourth Age have mainly ceased paying taxes, at least income tax, and so this is often private transfer. The Second and Third Ages support initial education both by private transfers and through the taxes they pay to support publicly provided learning. They also support each other; for example, we show how very considerable the tax relief is for employers providing training, and since older workers have far less access to training, this on balance represents a transfer from them to workers under 50.

The impression given is that all these transfers are financial ones. Of course this is not true. The single strongest factor influencing young people's educational achievement is the interest their parents show in their education. This surpasses parental income by a very long way. So these arrows represent commitment of a moral kind, as well as financial transfers. Most obviously, they point to the potential of family learning, where members of different generations learn together, to everyone's benefit (Lamb 2009). So the arrows should be taken to refer to all forms of support which contributes to the building of the three capitals I referred to earlier: human, social and identity.

The lower half of the figure is maybe the more interesting one. The arrows from Second and Third Aged to the Fourth Age signal how working age adults support those in the final years, publicly and privately. In the broad context, of course, most of this support takes the form of social and medical care. But we are arguing for a rebalancing of resources, which would mean that at least some of the taxes paid would go into expanding the very restricted learning opportunities currently offered to older people.

This would be a strong sign of intergenerational solidarity. It would also be an act of enlightened self-interest. For, we argue, increasing learning opportunities for older people (in the Third as well as the Fourth Age) would be a significant way of maintaining their independence, as well as their wellbeing. We know that participation in adult education has positive effects on physical and mental wellbeing (CERI 2007; Foresight 2008, Jenkins 2009), both directly and because it supplies people with social connections and contact. It there-

fore helps them lead their own lives, manage their own health and rely less on personal or institutional care. All this has massive benefits, to themselves, their families and the state.

So there is a firm rationale underpinning educational solidarity between generations. Comment is needed on the dotted line linking the extremes, the First Age with the Fourth. What does this represent? It signals that young people have a clear future interest in improving the learning opportunities available to older people. In part, the rationale is the same as above, ie in reducing unnecessary dependence of older generations. But there is a further component: young people age, and most of them will move through the Second and Third Ages to the Fourth Age. It is in their interest to have, waiting for them, a securely established platform of continuing educational opportunity.

Of course this may sound naïve. The horizons are such that many individuals will not want to commit themselves to these forms of delayed opportunity. It certainly requires more than cool logic to carry the case. But it is important to spell out these interdependencies in order to make the case visible. Too often, there is no framework for setting out and considering the arguments. Too much of current practice is taken for granted. In sketching out the case as we have done, the aim is to extend the range and reach of the debate.

### **Conclusions**

The world has changed dramatically since the Inquiry into the Future for Lifelong Learning began its work in autumn 2007. The global economy has seen a spectacular reversal; everywhere public finances are in huge difficulty, and although at the time of writing employment levels had held up surprisingly well for a recession of this magnitude, in many countries the fear of massive job losses is very present. Does this mean that all the recommendations from Learning Through Life have to be shelved, put away till better times re-emerge? Not at all. In fact the Inquiry never intended to pitch its proposals mainly in a context of increased public expenditure, at least not in terms of a sharp short-term rise. It makes the case for lifelong learning as an area of public policy, social action and individual responsibility. There are three particular implications.

First, we suggest changes which need to be managed over a period of years. Thus the rebalancing of resources is something which can only be undertaken in a ten-year horizon. Another of our proposals is for an end to the discrimination

against part-time study, where both individual and institutional funding favour full-timers. This is something which needs perhaps 5-6 years to bring about fully. There is never a perfect moment to start such shifts.

Secondly, the shock to the system has paradoxically opened up the terrain to fresh thinking. This is clearly the case when thinking about the distribution of working time. Instead of making people redundant, more employers are offering short-time working, and sometimes this is in conjunction with sabbaticals or study breaks. The generosity of these offers varies greatly; but they are generally far more satisfactory than simply throwing people into unemployment. The 'new mosaic of time' means that more people are combining employment (of shorter hours) with other activities – including learning. The learning may be instrumental, to equip themselves for the economic upturn, or fulfilling ambitions of learning for personal development. Both are welcome.

Thirdly, we argue for a more intelligent system. By this we mean a system whose different components talk to each other, learn from each other and as far as possible work towards the same goals. This means building consistent information over time. It means developing more imaginative as well as more systematic experimentation to see what works in promoting adult learning; and it means encouraging innovations which promote communication across sectoral and professional boundaries.

It is still too early to judge how far LTL, and the Inquiry generally, will shape the debate and influence decisions. However it would be fair to say that our model of the educational life-course has elicited a remarkably positive response from many different quarters, and that the thinking on public value analysis is already reflected in local policy approaches in several parts of the country. We shall return late in 2010 to attempt an evaluation of the impact so far.

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