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**WHAT ABOUT THE THIRD-AGERS?  
A STUDY OF PARTICIPATION IN INFORMAL/NON-  
FORMAL LEARNING BY OLDER ADULTS**

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DOCTOR OF EDUCATION (EdD)

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## Abstract

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Set in the context of an ageing population where longevity is often presented as a problem, this study aims to examine the participation of 60 – 90 year-olds in learning outside the formal sector and to contest the prevailing negative image of older people as non-participants in education. A survey of the literature illustrates the ageist attitudes prevalent amongst some educationalists and demonstrates how older people are often marginalized from the social and economic process, not necessarily by active discrimination but more by oversight and omission, their educational needs being largely ignored. The research seeks to understand the meanings older people give to education and to illuminate the processes by which some, even if only a few, come to learning in later life.

Calling for the inclusion of older learners in educational provision, the Carnegie Inquiry into the Third Age (1993) hinted that learning in a social context, with participants involved in planning their own learning, was a constructive way forward for this age group. A life history approach is used to compile learning biographies of twelve members of a self-help educational organisation, the University of the Third Age. Tracing the routes that have brought these people to learning in later life, the study examines their motivations to learn at different life stages and demonstrates how decisions to participate or not participate are conditioned by a complex interplay of reactions to social, cultural and historical events. Many of the current generation of older people constructed their lives against a background of limited initial education, economic depression and the disruptions of a world war, all factors which would seem to predict non-participation in learning. Yet many thousands of this generation are participants.

The study examines the role of learning in the lives of older people and seeks to understand their reasons for choosing to participate in a specific type of informal or non-formal learning where participants take responsibility for their own learning.

# 1. INTRODUCTION

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## **Focus of the study**

The focus of this study is learning in the third age and, in particular, participation in the type of learning promoted by the University of the Third Age. It aims to examine two widely held views: firstly that old age is a predictor of non-participation in education and secondly that limited initial education increases the likelihood of non-participation. A third and more important aim is to seek to understand the meanings that older people give to learning and to attempt to trace the events and beliefs which have helped shape the dispositions that have led them to become learners in later life.

Social and historical events in the United Kingdom impacted on patterns of participation in education during the last century and were especially significant for the current generation of retired people. Born in the first half of the twentieth century, when the majority left school at 14, and with lives disrupted by economic depression and a world war, it might be expected that they were unable to establish the habit of learning. They were also subject to the dramatic technological changes of the second half of the century and to the far-reaching social and economic developments of that period.

Determinants of participant behaviour are never straightforward, decision-making being shaped by a multiplicity of factors. This study seeks to discover the motivations of a number of committed older learners and to map events in their lives that may have led them in the direction of a particular form of self-help learning. Using a life history approach to study the educational life trajectory of twelve individual participants, it is intended to demonstrate that, for this particular group of third-agers, the brevity of their initial period of education was not a barrier to further study, as much previous research has suggested. For some it may have acted as a spur to make up for what was missed. Changing social and economic factors, historic events, and cultural norms for given social groups all impact on individual lives in diverse ways. Consequently for each individual, learning is a personal construct, decisions on participation being

taken in response to a complex network of time and context related factors. What these individuals have in common is their decision to participate in learning in the U3A.

### **Personal context of the study**

Before retirement nine years ago I had envisaged, together with my husband, enrolling on one or two local authority classes in subjects with a humanities bias. The intention was to study in areas of interest we felt we had neglected during our busy working lives: literature, history, and music. We had not realised the extent to which adult education provision had changed since our younger days. Every course appeared to be vocationally orientated, leading to qualifications of some kind. Feeling we were already over qualified, (Masters degree in my case and two Fellowships of scientific institutes in my husband's), we looked elsewhere. It was then we discovered the University of the Third Age (U3A).

We were very quickly drawn in to the local organisation and are involved both as learners and facilitators of groups. From the standpoint of a career teacher, the dynamics of the groups are endlessly intriguing and the enthusiasms of the students far beyond anything encountered amongst teen-age pupils. Learners appear to flourish in the relaxed informality of the classes. The age range encompasses many who never figure in participation surveys: one third are over 75 years and 15% are over 80. The ethos of the group is somewhat middle class but the students come from a very diverse range of educational backgrounds. It should be stressed that members of the U3A cannot be regarded as typical of the elderly population. Levels of educational attainment are well above the norms for this age group. Nonetheless, a quarter had left school by 14 and one third have no qualifications of any kind.

### **Growth of the U3A**

The U3A has grown rapidly since its launch in the UK in 1982. It can be described as a loosely knit collection of diverse learning co-operatives of older people who come together to share educational, creative and leisure activities, frequently in members' homes. The term 'university' should be understood in its medieval sense: a group of people devoted to learning, people who have

undertaken to learn and to help others to learn. No qualifications are required and none are given.

Currently in the UK (July 2003) there are 524 autonomous local organisations with around 130,000 members nationally. Each local organisation is self-funded, self-managed and draws upon the knowledge, experience and skills of its members to set up study and activity groups in accordance with the wishes of the membership. They can draw upon support and advice, if required, from national subject networks and from a national resource centre. The variety of subjects offered will depend on the size and enthusiasms of the local organisation. The fees are minimal and no one receives payment. A guiding principle is Peter Laslett's:

‘Those who teach shall also learn and those who learn shall also teach’

(quoted by Midwinter 1996 p.13)

In its British incarnation the U3A is a hybrid organisation of informal and non-formal learning. It is non-formal insofar as it has structured programmes of activities taking place outside the formal education system. It is informal in the contexts in which learning takes place and in the manner in which the participants, according to their interests, devise learning programmes and learn through contact with fellow students. No targets are set, no outcomes are measured, there is complete freedom to explore and expand knowledge. A deliberate decision was taken not to follow the formal French model, where third age participants enrol on courses organised by university departments, funded by central government. The founding fathers of the U3A in the UK, Peter Laslett, Eric Midwinter and Michael Young, rejected the top-down approach in favour of grass roots involvement. They believed that third-agers themselves had the skills to organise and to teach in their own autonomous learning groups. Learning should be regarded as a collaborative activity with every member expected to be involved in expanding the knowledge and understanding of the group. The term ‘teacher’ is avoided, preference being given to ‘co-ordinator’ or ‘facilitator’ to designate the person responsible for bringing a group together. Some groups decide to rotate the role of facilitator. The members are in control of their



planning and learning and are spared the hegemonic control of traditional academic pedagogy.

An extended study of students enrolled in the University of the Third Age in Malta (organised on the French model) concluded that the top down system was not in the best interests of many older learners (Formosa 2002). Whilst academic programmes suited the elite who already had a fairly extensive educational record, they alienated others who felt that the diversity of their life experiences was being ignored. Rather than being emancipated and empowered by these courses, many older learners felt patronised. They acknowledged the learning and expertise of the lecturers but would have welcomed more involvement in determining the format of the lectures. Our own observations of the British paradigm suggest that the opportunity to take charge of one's own learning is a liberating and empowering experience for many older learners.

Research, which can account for the emergence of self-help learning organisations run by older people themselves, is sparse. Until recently, educational gerontology has tended to focus on practitioners devising programmes of education that aim to alleviate the perceived problems of ageing. Mental fitness programmes, designed to empower and emancipate older people (Cusack 1999), demonstrate how ageist attitudes permeate research into ageing. Such prescriptive models, frequently employed in day centres or welfare/social provision, take away the autonomy of older people and deny them the right to determine for themselves how they wish to be treated. By concentrating on the negative aspects of ageing, gerontology has problematized the process and risks creating a separate species: 'the aged'.

Research that examines learning from the standpoint of the participant and which seeks to understand the emancipatory role of learning in older people's lives, could perhaps influence educational gerontology in a new direction, away from emphasis on ageing as a process of decline and towards a more positive view of old age. An investigation of the impact of the U3A on the lives of older learners could aid such a change of direction.

Recently there have been moves to involve older people as researchers in the field of gerontology, (Withnall 2000, Gaskell, T 2000). It is suggested that because older researchers have subjective knowledge of the experience of ageing they are able to share experiences and will produce richer data on the behaviour of the elderly (Bass and Caro 1995). Researchers who have lived and experienced their material, it is argued, can make legitimate knowledge claims. Being an insider has many advantages for the researcher. There is ease of access to the cases being studied; a rapport is already established and there is much common ground and understanding between the interviewer and the interviewee. Older interviewees may be reluctant to speak freely to a young researcher.

Jarvis (2001) also advocates the involvement of older people in all fields of research not just in gerontological studies. He believes they can bring experience and wisdom to their projects and may find access to data easier than would younger researchers. Such research could come as the culmination of a lifetime's work and is a wholly appropriate undertaking for retirement. Research is but another form of learning. This study, therefore, represents my personal project for learning in later life.

## **Issues around learning in the Third Age**

### **Demographics**

The second half of the twentieth century saw astounding increases in life expectancy amongst the populations of the developed world largely as a result of improved medical and health care. Mortality rates have reduced but at the same time birth rates have declined producing patterns of age distribution hitherto unknown. In Britain the Census of 2001 confirmed the constant forecasts of an increase in the proportion of elderly people in the population. For the first time ever there are more people over 60 than there are children. 21% of the population is over 60 and 2% is over the age of 85 (Census 2001).

‘There has never in the history of the world been a single society where older people outnumbered younger people ..... by the middle of the century there will be more people above the age of 50 than below it ..... Our whole historical precedent has been set by

societies dominated by youth and people in their mid-life. So what we are facing, in the century ahead, is a totally unprecedented situation, it is *terra incognita*' (Roszak in Elliott 2000 p.17)

The implications of this greying of the population are far reaching and the issues that arise from it have yet to be fully addressed. Increased demands upon welfare and health services are inevitable and the discourse of economic insecurity has been brought in to play to foster a climate of fear that the economy will be unable to meet these demands (Edwards 1997).

Ageing is largely addressed as a social/health/welfare problem, not as one that might be alleviated by providing cultural or educational opportunities. Current government policy is pushing in the direction of the individual taking more responsibility for their own care and it is intended that, in the future, fewer pensioners will be wholly dependent on state benefits. Unless there is a move towards extending the normal working life by several years, increased longevity combined with falling birth rates will produce a situation where a decreasing percentage of the population will be available for work. A reduced workforce will be called upon to support, through taxation, a growing number of dependants. In this climate it is only too easy to define the elderly as a problem. The stereotype presents them as a frail, heavily dependent group, incapable of meeting their own needs and a growing burden on the state.

### **Defining the Third Age**

Although the term has been in use for more than three decades, its first use being in France in the early 1970's, there is confusion as to who merits the designation third-ager and when does the third age begin? Increased longevity and earlier retirement (sometimes welcomed, sometimes feared) have opened up a new phase of life where significant numbers are expected to spend many years in reasonable health. This phase can be described as third age, being part of the sequence:

- First age - the period of school, further or higher education, entry into employment and young adulthood.

- Second age – the middle years, marriage and family, career development, maturity.
- Third age – a period of fulfilling retirement.
- Fourth age – a time of incapacity and dependence

These definitions were used by Laslett (1989) and subsequently were given validity by the Carnegie Inquiry into the Third Age (1993). Third age was defined as:

the period of life when people emerge from the imperatives of earning a living and/or bringing up children and, without precedent in our society, are able to look forward to twenty or more years of healthy life.

(Carnegie Inquiry 1993: iii)

This is a functional definition and makes no reference to age. The Inquiry encouraged its researchers to use 50 as a starting point for the third age and did not wish to set an upper limit. Jarvis (2001) specifies third age as 50 to 74 years old with fourth age starting at 75. This is surprising given that the main thrust of his book concerns the life course and gradual transition from one stage to the next, the stages not being determined by chronological age. He also uses the terms ‘young-old’, ‘old’, ‘older-old’ and ‘oldest-old’, which have the advantage of not being age specific.

Setting the starting point at 50 diverted the education section of the Inquiry into the field of learning/training for employment. Learning in retirement was somewhat sidelined. Current government thinking also takes 50 as the starting point for old age (Cabinet Office 2000) and emphasises the need to keep older people in the work force or engaged in useful activity.

For the purposes of this investigation of learning by older people, the term ‘third age’ will refer to people who, willingly or unwillingly, have left paid work and are no longer seeking employment. They have passed through the first age of

childhood dependence and experienced the second age of employment and responsibility. They have now reached what Laslett (1989) described as a period of active fulfilling retirement. One in five of the UK population is now in the third age. This substantial minority is becoming more and more visible. Perceptions of retirement as the few years remaining to us at the end of working life are changing. So: what about the third-agers? How is society going to deal with this unprecedented challenge?

The ageing population need not be a burden. Professor Tom Kirkwood, delivering the Reith lectures (BBC, Radio 4, May 2 2001) suggests that the potential offered by increased longevity has yet to be understood. Rather than concentrating on negative aspects of ageing, recognition should be given of the value of an older person's wisdom and experience. Older people have a role to play as volunteers, as carers, even as members of the workforce. More flexible work patterns would make it possible to retain those older people who wish to continue in work. Not all older people would wish to be involved in this way but means do exist to ensure that the third age is a positive experience. Dependency can be avoided or at least delayed. Housing and transport can be restructured and shops can be situated in areas accessible to older people. The knowledge and skills already exist to develop new models of healthcare and support for people in their own homes. Information technology could transform the lives of older people, providing contacts, information, entertainment and access to specialised services. Opportunities to participate in education and leisure activities may well enhance and maintain well-being and independence. Kirkwood strikes a positive tone in the field of gerontology, an area of study that has tended traditionally to portray ageing as a decline into decrepitude and dependency.

### **Diversity within the Third Age.**

Demographic concerns have led to the presentation of the pensioner population in terms of a statistical prediction giving cause for alarm. The terms in which they are described: 'an ageing population', 'pensioners', 'the retired' or 'the elderly' suggest a homogeneous group. Yet the elderly population encompasses an age range from 60 to 90 plus. There is insufficient recognition of the generational differences between those born pre-1920, those born in the twenties

and those from the thirties. There are class differences and educational differences, the length of initial education being largely determined by date of birth, social class, gender and ethnicity. Women were very unlikely to have received more than the minimum education. There are economic differences: some are fortunate enough to be affluent but others have to survive on the basic state pension. In physical terms, people age at different rates: some may be stricken with infirmity whilst others remain fit and active to an advanced age. Chronological age is a poor indicator of levels of mental or physical fitness. Likewise there are no norms for intellectual or leisure activity amongst third agers whose interests are as diverse as in any other section of the population. It should be noted that women outnumber men in this older age group and this imbalance becomes more pronounced with increase in age. This is an important factor when considering social, welfare, leisure or educational provision for this age range.

Older people's lives are as complex and multi-dimensional as those of other age groups – perhaps even more so. It is not uncommon for a retired person to be juggling responsibilities towards aged parents and young grandchildren, perhaps caring for a partner and trying to fit in their own life demands along side. Retirement has become a multi-faceted experience and new retirement life styles are developing. Elliott (2000), citing generational theory, suggests that as the 'baby-boomers', educated in the second half of the twentieth century, move in to the third age, older people are likely to become more powerful and will begin to impact on social political and economic policies. Consumer culture is drawing some older people towards new ventures in leisure pursuits including travel or learning. The social and cultural outcomes of these changes will be fruitful areas for future research.

Ageist attitudes can militate against older people taking charge of their own lives, enabling them to experience retirement as a positive phase. Provision of various services for the elderly can sometimes be perceived as paternalistic in approach, allowing the recipients of those services little or no input in the production or delivery. There is an air of 'we know what is best for you dear'. There will always be older people in need of help, but it can be provided in such

a manner as to enhance human dignity and not reinforce dependence. Others, and they are likely to be an increasing number, are well able to take charge of their own lives and will seek out opportunities to ensure an active and fulfilling retirement.

The message to be taken from here is that there is no single policy that can deal with all the needs of all the elderly. Their diversity has to be recognised: Older people of whatever age are not a single uniform group, but continue to be different in their individual purposes and aspirations (Carlton and Soulsby 1999).

### **A role for learning in the Third Age**

Although not all third-agers will be interested in learning, the case for giving older people access to education is a powerful one. Redundancy and early retirement have shortened the working life of many. For some the post-working life could be almost as long as working life. Rather than regarding old age as a problem, there are indications that many of those approaching retirement, or already retired, see the third age as a new beginning. It is a time to take up new interests or to develop existing leisure pursuits (Gee and Baillie 1999). Some third-agers become involved in voluntary work, in community activities or act as carers. Many will seek information or training to back up these experiences. Information technology is another area in which an increasing number of older people are eager to acquire expertise. Others use learning to maintain social contacts.

It can be argued that there is a moral dimension to be considered when trying to situate the third age within the paradigm of a learning society. In a fair and just society, older people might have the right to be included in educational provision if only as compensation for the lack of such opportunities earlier in their lives. This current generation of third-agers was especially disadvantaged by divides of class and gender and by the impact of economic and historic events. They might legitimately claim that, having paid taxes throughout their working lives, they now have a right to benefit from the available educational resources. The Carnegie Inquiry (1993), making recommendations on educational provision for the Third Age, acknowledged this moral justification, but also argued that giving

access to learning and leisure pursuits made economic sense. Such activities were likely to improve well-being and delay dependency. Currently the rhetoric of lifelong learning and the learning society seems to imply learning for everyone throughout the lifespan. In practice, over the past decade, government policies and funding have focussed upon measures to improve the skills and competitiveness of the work force. Third-agers have no place in work-orientated schemes that emphasise vocational progression and certification. In this climate there is a danger that learning which enables students to pursue wide-ranging interests: 'the accessible, joyful, neighbourhood-based, cultural adult education' will disappear or will be priced beyond the means of third age learners (Stock 1993 p.10).

The rhetoric of the learning society speaks of education as a cohesive force, enabling people to fulfil potential and to play a full part in the community. Does this imply an obligation to ensure access to learning opportunities for older people? Can we justify such additional expenditure? Schuller and Bostyn (1993) spoke in terms of a social economy of the third age. Taking account of the contribution to the economy of older people as carers and volunteers and as cultural trustees, we should ask what the costs of failing to make adequate learning provision would be. Given the costs of dependency, investment in measures that sustain independence would seem to offer a good return. Access to education alone may not be sufficient. However, taking a pragmatic stance, it would seem to make sense to keep older people active both physically and intellectually, thus delaying dependency and rendering them less of a burden on government expenditure. We should be asking what the costs might be should we fail to provide learning opportunities for the elderly.

Health matters are a concern for older people many of whom express the opinion that an active old age is a way of combating ill health and that intellectual activity delays senility. This is a view often voiced in the media, especially in journals aimed at the retired, promoting a fit and healthy life style. Schuller and Bostyn (1993) told us there were no hard studies demonstrating a link between health and learning. Five years later the UK government Green Paper: The Learning Age (DfEE 1998 p.10) asserts that 'learning helps older people stay



healthy and active', without specific reference to the research on which these assertions were made. Withnall (2000) also indicates that there is emerging medical evidence concerning the beneficial results of continued mental stimulation in later life. Evidence of the health benefits of learning will be examined further in the literature review.

At the simplest level, an informed third age makes sense; pensioners need to be able to negotiate their way through the complex field of social legislation and welfare rights and should have access to the latest information on health matters. They need guidance in the uses of new technologies otherwise they risk being marginalized, unable to adapt to the rapid changes taking place in society. At a more complex level, if we exclude third agers from learning opportunities, we risk the loss of the cultural capital that they have amassed during their lifetime and we deny them a role in the on-going development of our culture.

### **Educational provision for the Third Age**

If we accept that learning is of benefit to older people then we must consider the nature of the provision and who is responsible for such provision. Should we deploy more resources for older people? If the answer is yes, how should this be done and at whose expense? Should this be a charge on the education budget, or is it part of the social/welfare expenditure?

Individual local authorities or educational institutions may be offering learning programmes aimed specifically at this group but these are not well documented. Low participation rates may lead to an assumption that the majority of older people are not interested in learning, therefore funds need not be deployed in promoting courses. Until recently, government education policies have not targeted older learners, although there are indications that this may be changing. It may be that targeted provision is not the correct way forward. Surely participation will be encouraged where there is the widest possible provision and no restriction on access for any age group.

The last decade of the twentieth century saw a decline in the provision of non-vocational classes, an area in which older retired people are most likely to be

found (Stock 1993; Tuckett 1996). Where such classes have remained, fees have risen and even at concessionary rates are often beyond the means of older people. There is also a wide variation in the range, volume and quality of opportunities on offer in different parts of the country. Funding from central government has been directed towards vocational work-related courses leading to accreditation. The costs of adult education are now largely borne by the participants. Tuckett and Sargant (1999) have pointed-up a decline in participation in formal adult education by older people. They suggest that whilst this may be due to a continuing decline in investment by local authorities in non-vocational classes, there has also been an increasing emphasis on courses leading to qualifications. This trend may well act as a deterrent to older learners. Likewise, in the interests of cost cutting, classes may have been relocated into large centralised institutions, rather than the more familiar local school. In this situation, transport difficulties may add another deterrent. A combination of costs, inappropriate curriculum, awesome institutions and transport difficulties may well have contributed to the apparent disappearance of older learners from the formal sector.

### **Informal learning/learning as leisure**

Older people are engaging in learning but it is difficult to obtain reliable data. Participation surveys have tended to be concentrated on the recognised sites of adult education. The learning activities of third agers, which often take place outside formal institutions, for example in local clubs, homes, churches, voluntary organisations, leisure centres, campaigning groups, are very rarely surveyed. If we focus on adult *learning* rather than on adult *education* we will find there are many venues where learning is taking place. Some are run on a commercial basis, many are self-funding; others may receive support from welfare or social budgets. Those receiving funding through social or welfare budgets may have to be accountable to the fund providers and provide statistics of participation by age. Other organisations may only be accountable to their clients and have neither the time nor the resources to devote to information gathering.

Professional adult educators may have doubts about the validity of some of the learning being undertaken outside the formal institutions, especially as there are no agreed criteria for assessing such learning. Formal learning is relatively easy to define as systems of organised learning, hierarchically structured, chronologically graded, with measurable inputs and outputs. Edwards and Usher (1997) describe the ambivalence felt by the adult education community around the notion of education as leisure. There is an assumption that leisure activities are not sufficiently serious to be considered as education. The funding arrangements introduced by the 1992 Further and Higher Education Act reinforce this belief. Accredited courses, mainly with a vocational bias, are funded and approved by the state and are termed legitimate education. Leisure pursuits are of less importance and must be largely funded by the individual participants. The subsequent loss in many parts of the country of publicly funded, life-enhancing leisure time learning may have provided the impetus for the expansion and strengthening of the U3A.

Yet, as Percy (1997) argues, the boundaries between different forms of learning are beginning to blur. The divisions between the sectors are probably more in the minds of professional educators, policy makers and funding bodies. Adult learners are probably unaware of the divisions. Decisions to participate are determined by a multiplicity of factors: appropriateness of course, convenience of time and location, social possibilities, empathy with the course leader. Some learning will be for career advancement, but much of it will be in leisure time for pleasure and for social and personal development.

Mapping exercises carried out under the NIACE Older and Bolder project (Walker 1998) suggest that there has been a move towards informal learning by older people, rising costs and an emphasis on certification in LEA classes having pushed them towards cheaper alternatives. This may account in part for the rapid growth of the U3A, which reports a five-fold increase in membership between 1989 and 1999, and a year on year increase of 15% (U3A News Spring 2000). Increasing numbers of third agers are becoming involved in community-based learning organisations. There are also hints that learning as a leisure pursuit may

become part of a retirement lifestyle and be considered as appropriate behaviour for older people (McKie 1999).

### **Measuring participation/non-participation in learning by third-agers**

Participation rates in both formal and informal learning by older learners are reportedly very low. Beinart and Smith (1997), in their National Adult Learning Survey for the DfEE, suggest a figure of only 3% of over 60's engaged in learning activities. Tuckett and Sargant (1999) report a higher figure of 16% of over 65's in their review of the research conducted on behalf of NIACE [The National Institute of Adult and Continuing Education]. However in both cases the statistics are suspect. The age range surveyed by DfEE was 16-69 and did not include the really old. In neither case is it clear whether questions were asked about informal learning. Studies directed at people of working age inevitably present older people as non-participants as they are unlikely to be found in courses that are work-orientated. Those approaching retirement, or already retired will not be drawn towards retraining. Sargant (1996) examined participation in both formal and informal learning and again concluded that older people are consistently under-represented in the take-up of learning opportunities. It could be that older people are simply under-represented in surveys and that the methodologies are not sound. Older people are usually defined as 60+ for survey purpose. One fifth of the population is aged 60+, but is unlikely that this proportion was reflected in the surveys.

It is apparent that there is no coherent view of the learning habits of third-agers. Many providers do not collect figures for older learners other than to describe them as 60+. Different researchers use differing methodologies in collecting their data and there is confusion on the part of the respondents as to what constitutes learning. The boundaries between leisure and learning are blurred and many older people may regard their learning as social activity. Nor is there any way of measuring the learning of those pursuing individual interests at home, or in libraries, and increasingly on the Internet.

The majority of studies on participation have presented negative images of the elderly. They are usually cited as non-participants, tacked on to the ritual list of

disadvantaged as in: single mothers, those on low incomes, unemployed, disabled, ethnic minorities, ex-offenders *and the elderly* - a dismal collection of the socially excluded. Kennedy (1997) and Fryer (1997) both produce lists of this kind, possibly based on earlier survey findings (e.g. McGivney, 1990; Sargant et al 1991). Explanations of their non-participation are enumerated with such frequency in the literature that there is a danger that these findings are accepted without question and that non-participation of the elderly becomes accepted as the norm. It should be noted that this research was based on studies carried out in the late 1980's. The proportion of active retired people in the population has increased and it is possible that the profile of pensioners has altered. It is perhaps time to re-examine the field of participation and non-participation, especially with regard to older people.

### **Rationale for the research**

- Increased longevity means that the post-work period is likely to be long, yet this extension of the period of late adulthood with its consequent social and cultural outcomes is largely unexplored. Policies to deal with the learning needs of the elderly and their inclusion in the learning society are yet to be formulated. There is a paucity of information on third age learning experiences.
- The supposed benefits of learning in later life have not been fully investigated. Links between learning and health are not yet proven, although it is being suggested that learning may promote mental well-being and delay dependency. In addition, access to information is essential for the elderly who should not be marginalized through lack of knowledge of the new technologies.
- Constant references to older people as non-participants must be challenged. Older people are participating in learning, but their participation is not being effectively measured. Studies, which investigate successful models of participation and which aim to understand the motivations and the routes that have brought people to learning in later life, may provide insights into widening participation.
- There appears to have been a move towards informal learning with rapid growth in organisations such as University of the Third Age. Is it possible to account for this trend and discover why older people are taking up such

learning? Does the informal/non-formal context offer easier access to learning for this age group?

- Studies of those third agers who do participate have been very few especially for the older end of the age range. We should be looking at who participates and why. Whilst it is important to understand the reasons for non-participation and to seek to engender more inclusive policies and practices, it may be more productive to examine the positive aspects of being a participant. Why are some older people attracted to learning? In what kind of environment do they prefer to learn? Do they have a history of learning throughout their lifespan or have they discovered learning in later life (opsimaths)? Do they match the generally accepted criteria for participants (e.g. high level of education, middle-class, male)? To concentrate only on reasons for non-participation is a negative approach to widening participation. We need to understand the underlying processes and mechanisms that influence participant behaviour (Tikkanen, 1998, Withnall 2000).

## 2. LITERATURE REVIEW

The Carnegie Inquiry

Lifelong learning, the learning society and the third age

The invisibility of third-agers in participation studies

Participation theories

Ageism and the role of gerontology

Access to learning as a right

What kind of learning?

Summary and focus of the research

### THE CARNEGIE INQUIRY

A useful starting point for surveying the literature relevant to older people and their involvement in learning is the Carnegie Inquiry as it provides signposts to many of the issues.

**The Carnegie Inquiry into the Third Age (1993)** was set up to investigate the situation of older men and women across a wide range of policy areas such as health, employment, pensions and citizenship. Education was but one of those areas. Set in the context of an ageing population, greater longevity and increasing pressure on social benefits and health care budgets, its brief was to make policy recommendations that would enable older people to play an active part in society. The section dealing with education (Schuller and Bostyn 1993) attempted to produce co-ordinated and coherent policies to meet the needs of older people. Its list of recommendations to educational institutions, to local government and to national government was long and impressive. There were calls among others for:

- a clear policy statement on the *rights* of older people to a broad range of educational opportunity
- an obligation on LEAs and funding bodies to secure sufficient provision of adult education, to set and monitor targets for participation, acknowledging the *particular needs of older learners*

- co-ordination of and support for distance learning providers with particular reference to older learners with problems of mobility
- provision of as broad a range as possible of learning opportunities for older people, *allowing the participants to voice their needs and have a role in curriculum development.*

The report coincided with fundamental changes in organisation and funding arrangements engendered by the Further and Higher Education Act (1992), whereby further education colleges in England and Wales were removed from local authority control. Local expenditure was also being subjected to stringent budget capping. Consequently, rather than the expansion in educational provision for older people that Carnegie hoped for, adult education, especially of the non-vocational variety, suffered severe cutbacks (Stock 1993, Bell 1996). A decade later movements towards implementing some of the recommendations are becoming apparent. The Inquiry had provided a yardstick against which future actions could be measured and had pointed research into learning in later life in particular directions – not necessarily the most useful.

For the purpose of the Inquiry the age of 50 was chosen as the start of the third age, (surely a choice to be vigorously contested by 50 year-olds). The investigation of participation in learning by older people was thus deflected towards examining involvement in training or education associated with work. Yet the stereotype of older people defines them as being excluded from economic activity and therefore a group for whom training for work could be deemed largely irrelevant. It might have been more appropriate to avoid mention of a specific age and to be guided by the Inquiry's functional definition as the period in life occurring post full-time work commitments and post child-rearing, a period of retirement which might extend for many years and where wide ranging opportunities for learning might be welcomed. If it had been possible to restrict the study to areas of most relevance to third agers, for example informal learning or non-vocational classes, a less complex inquiry might have resulted, with recommendations which were easier to implement. In the event, the final



recommendations directed at statutory bodies were mainly concerned with formal provision.

The authors of the report acknowledged the problems in obtaining accurate statistics for participation by older people in informal learning. Drawing widely on the work of Sargant (1991) for NIACE, they showed that figures for people enrolled in classes were only a small proportion of those who could be described as involved in learning activities and much of this data was based on estimates. The researchers admitted to being unhappy with the inadequacy of their statistics. They reiterated comments by Percy on earlier attempts, referring to his analysis of three sets of data from the 1970's and 1980's:

These surveys just about enable us to subscribe to a generalised statement such as this: 'we know that for those of pensionable age (and thereabouts) current (i.e. at the time of asking) participation in classes (i.e. all classes: work-related education may make little difference to the figures) is in the range of 2-7%. About two-thirds of this age group have never participated in classes. The remaining (25-30%) have done so in the past, but are not at present doing so.

(Percy 1990 p.31)

A decade beyond Carnegie, the picture is hardly any clearer. The difficulties in obtaining valid statistics for levels of participation, especially for the retired, will be examined at a later stage in the literature review.

Subsequent studies have tended to follow Carnegie in using the age of 50 as the start of the third age. This has militated against looking at learning in retirement as a distinct field of study. Most subsequent studies have concentrated on people still in work, with the emphasis on training or re-training following redundancy. Government continues to regard 50 as the trigger point for old age. A press release announced the appointment of a 'champion of older people' to monitor the needs of over-50's 'who are in danger of being written off by employers, by society and by themselves' (Cabinet Office 2000, p.1). Numerical age is not a good basis for distinguishing a particular group. It might be more useful to

identify them by life circumstances. The term ‘third age’ attempts to do this but it fails to convey the diversity of experience, aims, and aspirations to be found within a segment of the population that is far from homogeneous. It has to encompass an age range of thirty or more years, differing levels of income and social circumstances, differing levels of mental and physical health and differing demands of care.

The policy recommendations of the Carnegie Inquiry were based largely within the welfare state social framework and emphasis was on the responsibilities of institutions, statutory bodies and the formal sector to provide for the educational needs of third-agers. Although condemning ageist attitudes the report tended to perpetuate them. To advocate local or national intervention, informing people of their needs and offering solutions could be regarded as paternalistic, implying that older people are incapable of organising themselves. This is not to say that there should be no provision for third-agers, but as the report suggested, learning initiatives are more likely to succeed when the students have an involvement in planning, and where the courses respond to needs as they perceive them.

The Carnegie Inquiry highlighted the following issues which will be considered in later sections of the literature review

- Negative stereotyping of the elderly as non-participants
- Low participation rates for all adults, but especially older people
- Limited learning opportunities available to third agers and inequitable distribution of provision.
- Difficulties in establishing criteria against which to evaluate the learning activities of older learners.
- Low educational base of third agers is not of their own making – there is a need to counter the inequalities of history
- Measures to delay dependency make economic sense.
- Boundaries between and learning and leisure, formal and informal education are becoming blurred.

## **THE LEARNING SOCIETY, LIFELONG LEARNING AND THE THIRD AGE**

The Carnegie Inquiry reported at a time before the twin mantras of Lifelong Learning and the Learning Society had become the dominant discourses in the field of post-compulsory education. Initially these discourses did not serve third-agers well. Emphasis on the economic imperative tended to marginalize older people and it was only in the closing years of the century that references to their particular needs began to figure in government policy documents.

From the political standpoint these are fine sounding banner heads behind which to arouse the electorate. However, definition of the terms is complex. Edwards (1995), pointing out the lack of clarity in our understanding of the term learning society, identifies three strands:

- a learning society that is committed to active citizenship, liberal democracy and equal opportunities. Education is seen as the means to help adults meet the challenges and uncertainties of technological, demographic, economic and cultural change.
- learning as a market, forming part of the economic policy framework. Institutions supply services to be used to update the skills and competencies of the work force and thus ensure the competitiveness of the national economy. The market will respond to the perceived needs of industry and commerce. Individuals should invest in lifelong learning to improve their personal competitiveness.
- a learning society comprising learning networks in which learners adopt a learning approach to life and where resources are available to allow individuals to develop their interests and enrich their personal identities. There are links here with the consumer society, the enjoyment of leisure and the blurring of boundaries between learning and leisure.

The three strands are interwoven but it was the economic imperative that became the dominant discourse. Older learners tended to be sidelined in the quest for economic competitiveness. Payne (1999 p.9) warned us that lifelong learning

with its many perspectives 'is proving a slippery customer' but suggested that the term carries a 'heavy load of workplace related meanings'. There is much emphasis on training and the need for workers to upgrade their skills in order to keep up with the changing world. Lifelong is here interpreted as the opportunity for members of the workforce to train or re-train as often as necessary during their working life, thereby improving the skills and efficiency of the work force. Personal development in this context means ever more training to ensure progress up the career ladder. There seems to be no place for third-agers in this arena. Within this climate of vocationalism, learning which enables students to pursue wide-ranging interests and to enrich their personal identity, risks being pushed out of mainstream provision. A narrow definition, relating primarily to the workplace, is inadequate to meet the learning needs of those outside the work force: those with domestic commitments, the unemployed, and the retired. In this context, lifelong learning can become a mechanism for exclusion and control and the creation of inequalities. There are issues around access to knowledge. In a knowledge-based economy, those who have the lowest levels of skill and the weakest capacity for updating, risk social exclusion.

The concept of lifelong learning can be widened. Not only must work skills be updated but also new knowledge obliges all citizens to become lifelong learners; social changes coerce us in to learning if we are to cope with and participate in modern culture (Alheit 1999). At the macro level we can follow the traditional response of governments: more education and more training. At the micro level we can encourage the forms of learning undertaken by individuals and organisations with minimal state involvement. Learning can take place in many settings: clubs, voluntary groups, in the home. There is a perceived movement away from system-controlled education towards student-initiated experiences. The Internet and distance learning programmes enable students to use learning resources autonomously as and when they see fit. All these reflect Edwards' concept of open learning networks, which can foster a wide range of skills and abilities and where active citizenship is encouraged. In such a learning environment groups like the U3A can flourish. Learning is self-directed and the participants determine their own learning needs. Government may facilitate such

networks but this support is not essential and perhaps not desirable if they are to remain autonomous and responsive to the needs of the participants.

The broadest definition of lifelong learning is favoured by Jarvis (2001) who describes the whole of life as a learning experience, where people change and adapt to the social situations in which they find themselves. He echoes Giddens:

The reflexivity of modern social life consists in the fact that social practices are constantly examined and reformed in the light of incoming information.....Knowing 'how to go on' in Wittgenstein's sense is intrinsic to the conventions which are drawn upon and reproduced in human activity. In all cultures, social practices are routinely altered in the light of ongoing discoveries, which feed into them.

(Giddens 1990, pp 38-39)

The nature of knowledge itself is changing, generating a need to acquire new competencies. People are led to reflect constantly and adapt their behaviour to their changing circumstances. The older people in this study, as they considered their life stories constantly indicated the manner in which lifetime experiences were transformed into knowledge, skills, values and beliefs. The studies of life histories of a range of learners in Finland by Antikainen and his team (1996), vividly illustrate the importance of learning from life. Reflective learning is the way we move through life. Such adaptation has always been the case; today the process is required to be much faster. The concept of the whole of life being for learning is not new. It was expounded in Plato's 'Republic'. In the twentieth century it is explored by Lindeman (1926) and Yeaxlee (1929) and Faure et al (1972).

Is a reflexive society synonymous with a learning society? Does the learning society exist or is it simply a myth? The learning society myth serves an important function: it provides a convenient and acceptable rationale and packaging for the policies of government and other power groups (Hughes and Tight 1998). The terms lifelong learning and learning society cannot be adequately defined; they are generalities and are not in any way policies,

whatever governments may claim (Griffin 2000). Nonetheless, they are aspirations that should inform government policy. The role of government is to create the conditions in which the ideals of lifelong learning and the learning society can be nurtured.

### **Government policies for lifelong learning and the learning society**

The year 1997 saw the arrival of a new government in the UK with a promise of 'education, education, education'. A flurry of policy reports, consultative documents, green papers and white papers were thrust before the educational world, looking at various aspects of post-16 education. These documents bristled with the rhetoric of lifelong learning and the learning society. They demonstrated the tensions running through the debates around the precedence of economic imperatives over social and democratic aims. References to learning for older people were minimal and, where they occurred, the image presented of old age was mostly negative.

Ways of widening participation in further education were considered in the **Kennedy Report (1997): *Learning Works***. There were only two references to older people: one to older workers and the other to older registered unemployed and these were only casual references. Lifelong learning in Kennedy's vision appears to end at 60 or maybe even 55. The sub-text of the report is to widen participation, particularly for those whose initial education was limited, and also to attract people on low incomes but Kennedy does not extend this to older people.

In the **Fryer report (1997): *Learning for the Twenty-First Century***, lifelong learning was treated as a self-evident good but with no attempt to define the term. The report proposed the need to develop a learning culture wherein lifelong learning for all is the norm but there was no clear guidance as to how this learning society will be brought about. A learning divide was identified. On the one side are those who are already well qualified and who carry on with active engagement in learning throughout life. They are a minority. On the other side is the majority who have minimal qualifications and achievements, have not been

involved in learning since the end of compulsory education and have no plans to do so. Typical non-participants are listed: ex-offenders, disaffected young men, people with learning difficulties and/or disabilities, single mothers, sufferers from mental illness, those living in remote or isolated locations and older people. Does this mean *all* older people? Or only those who are disadvantaged? Here, as is frequently the case, older people are treated as one homogeneous group. [In defence of Fryer, the list was, probably recycling those of McGivney (1990) and Sargant, et al (1997). There should however have been some attempt to account for non-participation].

From the gerontologists' stance, Glendenning and Percy (1998) strongly condemned this negativism and in particular the ageist language evident in the report, arguing that such language should never appear in a report by a nationally appointed group reporting to Government. Most references to older adults were in negative and stereotypical terms. Later life was associated with ill health, dependency, frailty, poverty, lack of dignity, disadvantage and a patient wait for the release of death. They were described as:

frail members of the community who might be living alone, or with the family or in residential provision. They may have increasing difficulties with mobility or with general health and may lack finance and other resources. For them, continued or renewed opportunities for intellectual stimulation will make all the difference between a life retaining some prospect of dignity and independence. The bleak alternative is an existence which appears to be doomed only to a patient wait for the release of death, borne along by varying combinations of benign condescension, dependence and neglect.

(Fryer 1997 p.37)

There was nothing about freedom from work and family ties, voluntary activity or the positive contributions to society of many older people. The only rationale, which the report offered for access to learning for older people, was to save them from a life of misery, dependence and neglect. The vision of a new culture of learning for all, throughout the life span, could have been elaborated into a

notion of lifelong learning as a progression through life towards the ultimate state of being an older learner, but the Fryer report missed this opportunity.

The consultative paper, *The Learning Age* (DfEE 1998) arising from these reports appeared to be firmly in the camp of education as a function of economic policy, defining lifelong learning as:

the continuous development of skills, knowledge and understanding that are essential for *employability* and fulfilment.

(DfEE 1998 p.11)

It was implied that personal fulfilment comes as a consequence of being a member of the work force. Those outside the workforce such as the unemployed, home-based mothers and carers and the retired, risk being condemned to social exclusion.

The Kennedy and Fryer reports had examined ways of expanding provision and participation in further and higher education institutions in the service of the economy, but other wider aspects were also being proposed. Fryer had pleaded for a new culture of learning in the country, wherein learning for all, throughout the lifespan, becomes the normal progression. There had been hints about the desirability of using learning to create a more fulfilled, aware and socially cohesive citizenry and indications of a possible role for non-formal, informal, home-based and community-based learning. There had been no references to learning in retirement in these earlier documents. However in the *Learning Age* we had the first acknowledgement that adult education classes enhance retirement for many. Fryer's negative stereotyping of non-participants and the elderly did not find its way into this document. More significantly we see a commitment to encourage learning in the community for aims other than economic soundness:

Community, adult and family learning will be essential in the Learning Age. It will help improve skills, encourage economic regeneration and individual prosperity, build active citizenship, and inspire self-help and local development.

(DfEE 1998 p.48)



and again:

learning contributes to social cohesion and fosters a sense of belonging, responsibility and identity.

(DfEE 1998 p.11)

The arrival of the White Paper: *Learning to Succeed* (DfEE 1999) saw a move towards recognition of the three strands in the banner of the learning society and perhaps towards assigning them equal importance. In the foreword, the Secretary of State for Education presented a vision of lifelong learning that will enable people to:

fulfil their potential and cope with the challenge of rapid economic and social change. Lifelong learning can enable people to play a full part in developing their talent, the potential of their family and the capacity of the community in which they work and live. It can and must nurture a love of learning.

(DfEE 1999 p.3)

In this White Paper, the culmination of all the previous reports and consultation exercises, the economic imperative was ever present but it was tempered with references to the impact of learning on individual potential, and to its civilising and cohesive effect on communities. For the first time the benefits of learning in later life were being promoted together with the need to overcome generational disadvantage:

Older people benefit greatly from learning. Research has shown that older people who continue to be active learners enjoy healthier lifestyles and maintain their independence longer than those who stop learning.

Grandparents can also play an important role in family learning, supporting children to acquire good reading skills. The Learning and Skills Council will work to break down barriers to older people playing a full part in a learning society.

(DfEE 1999 p.55)

This was hardly a broad vision of learning in later life with its cosy middle class imagery of active, healthy grandparents returning to the family hearth to read suitably uplifting works with their grandchildren. There was no mention of acquiring new skills or fulfilling lifelong ambitions, no recognition of the diversity of interests and motivations within the older population. The prospects of improved health and delayed dependency were cited as the justification for allowing the elderly to take part in the learning society, although it was not explicit which research was being cited to substantiate this claim.

However, government policy appeared to be starting to recognise the importance of widening the arena in which learning takes place, acknowledging a role for community-based learning. Voluntary organisations, leisure centres, religious bodies and social clubs were all cited as offering learning opportunities. Such learning is likely to be more socially cohesive and inclusive than education taking place in formal institutions and is possibly more attractive to older learners. Funds were made available to encourage learning in community groups but it was not clear how resources were to be allocated. The Adult and Community Learning Fund was supplanted by the Learning and Skills Councils (Spring 2001), but local authorities are still wrestling with the problems of distributing finance to community groups and of monitoring its use. There are difficulties in establishing criteria against which to evaluate learning activities outside traditional educational establishments and groups also need guidance on accessing these funds and how to submit proposals.

### **THE INVISIBILITY OF THIRD-AGERS IN PARTICIPATION STUDIES**

The policy documents all demonstrated a commitment to widening participation in learning but did not indicate how this was to be brought about. There appeared to be little understanding of the complex issues pertaining to participation/non-participation. Reviewing the literature, McGivney (1990) points up the difficulty in gathering accurate statistics for the participation of adults in any form of post-school learning. The population being surveyed is vast and diverse and the methods and terms of reference vary between surveys. There is no clarity as to what constitutes post-school learning or even what age range the term 'adult'

covers. Surveys of participation in adult learning usually cover higher and further education and work-related training. Research has been concerned chiefly with participation in formal learning by people of working age and has barely touched on the learning activities of older people. Studies directed at people of working age will inevitably present older people as non-participants. Informal learning, which is possibly more attractive to older learners, is notoriously difficult to survey (Sargant 1996, Sargant, et al 1997). Many providers do not collect figures for older learners other than to group them as one category: 'over 60'. Different researchers use differing methodologies in collecting their data and there is confusion on the part of respondents as to what constitutes learning. Many people, especially older ones might regard their learning as social activity and not answer positively in surveys on learning habits.

Although admitting the inadequacy of participation surveys, McGivney (1990), goes on to posit a participant typology. The most likely participant will be young, male, from a higher socio-economic group and already in possession of some educational qualifications. Social class, age, gender, location and previous educational experience all impact on the likelihood of participation. McGivney lists categories of people who are unlikely to participate. Inevitably the elderly and those with limited initial education always figure in the lists of the deprived and the disadvantaged and the conclusion drawn is that old age denotes non-participation. The categories have been handed down from report to report [see Kennedy (1997) and Fryer (1997)]. To designate particular categories as non-participants risks furnishing an excuse for lack of provision for such groups. Where financial considerations are pre-eminent it might be tempting to concentrate on provision which will be assured large numbers of participants and to ignore fields of study which might interest the typical non-participant. Indeed the market-place model of education, favoured in the final decade of the last century, was observed to draw funding away from community-based projects, directing it towards courses that could be demonstrated to have sound economic outcomes. This practice tended to disadvantage those in the greatest need of educational provision (Tett 1993).

These non-participant categories were first suggested in the 1960's in the United States by Johnstone and Rivera (cited by McGivney 1990), but they are still being regurgitated many decades later (see McGivney 1996). Most of the research into non-participation has centred on the notions of barriers: situational, institutional and dispositional (Cross 1981). Lack of time, costs, transport and family commitments are frequently cited as reasons for not enrolling in courses or the unsuitability of what is on offer. Tett (1993) suggests that dispositional factors such as attitudes, perceptions and expectations are the most powerful deterrents to participation. It appears that researchers are well versed in explanations of non-participation, but much less so in factors that encourage participation. There has been much concentration on the negative aspects of non-participation rather than focussing on the positive aspects of participation. In particular more information is needed about the learning which is happening outside the formal institutions and which is scarcely recorded. Discovering who participates in what, and why they are participating would surely be a more productive path towards widening participation. There is little understanding of the participant behaviour of those who chose to continue learning long after the goals of formal education have been met (or not).

In the major participation studies of the 1990's older people are consistently shown to be under-represented in the take-up of learning opportunities. It may be that older people are always under-represented in surveys of any kind and that the methodologies are not sound. Older people are usually defined as 65+ for survey purposes, (in some instances 60+, or even 50+). One fifth of the population is over 65, but it is unlikely that this proportion is reflected in surveys. Sargent (1991) examined participation in many aspects of both formal and informal learning. Younger sections of the population were surveyed in age segments of nine years (e.g. 35-44, 45-54), whereas the 65+ segment covers a range of perhaps 30 years, by no means an homogenous group. Sargent's assertion that interest in learning new subjects peaks at 25-34 years, and thereafter declines, is not borne out by the statistics she quotes. In the interest tables older people are shown to be just as interested in languages, arts, culture and home skills as the rest of those surveyed. It was only in the areas of work-related subjects that there was markedly less interest. Is this a case of

disregarding the evidence because it does not fit the thesis? Why would older people be interested in work-related subjects, asks Tuckett (2001), suggesting that few learners in their eighties are attracted by the romance of an NVQ3.

The DfEE National Learning Survey conducted by Beinart and Smith (1997) examined participation in vocational and non-vocational learning but provides no figures for informal learning. The claim is made that a wider range of learning experiences was included than in previous surveys but they suggest that respondents were not always clear about the legitimacy of describing informal learning as 'learning'. The representative sample of adults was aged 16- 69. Again no attempt to survey older learners. Failure to include older learners in the sample might imply that this age group is insignificant. Is this an example of ageism or merely oversight? Did they attempt to survey people over 70? Or were they working on the premise that older people do not participate?

Similarly Gallup surveys conducted for NIACE (Tuckett and Sargant 1996, Tuckett and Sargant 1999) are suspect. In the winter of 1996 a sample of 4,673 adults aged over 17 were interviewed about their involvement in learning. Unsurprisingly, current and recent participation in learning was highest amongst the young people and decreased with each successive age cohort. 86% of 17-19 year-olds, 43% of 35-44 year-olds, 19% of 65-74 year-olds and 15% of 75 plus year-olds reported current or recent learning. We are not told how the interviewees were chosen. Was it a random sample? Did it reflect the percentage of older people in the population? Was there a spread of social classes? All of these factors would influence the statistics. A fall of 20% in participation by older learners was reported during the three years between the surveys. It was suggested that this was a consequence of cut backs in spending on non-vocational courses, but this is difficult to verify and it is likely that the causes are more complex.

Thus there is no clear picture of the learning activities of third-agers. It is possible to collect statistics of enrolments of older people in formal learning organisations, although many institutions will classify them as simply 'over-60'. It is known that such enrolments are a small percentage of total enrolments, but

the reasons for their absence have not been explored. Was unsuitability of courses considered? Attempts at quantifying participation in informal learning are rare, an honourable exception being the Older and Bolder Project sponsored by NIACE (Carlton and Soulsby 1999). Methods of investigating informal learning and our understanding of it have barely developed since Tough's work thirty years ago (Field 1999). One aspect of this present research project is to attempt to develop a methodology that can capture the social nature of much informal learning and the diverse settings in which it takes place.

Examples of the non-participation of third-agers are enumerated with such frequency in the literature that there is a danger that these findings are accepted without question and that non-participation of the elderly becomes a self-fulfilling prophecy. It should be noted that a decade has passed since McGivney's studies on participation (1990) were undertaken and since Schuller and Bostyn (1993) reported for Carnegie. The proportion of active retired people in the population has increased and it is likely that the profile of pensioners has changed. It is perhaps an appropriate time to re-examine the whole field of participation and non-participation, especially with regard to older people.

Old age, together with limited initial education and poor socio-economic background is generally cited as a predictor of non-participation. These characteristics should not necessarily be taken as a causal explanation. The Carnegie Report drew attention to the low educational base of third agers, indicating that two thirds of those over 50 had left school at 15 or earlier and that the majority of those over 70 had no formal qualifications at all. Schuller and Bostyn (1993) indicated that the educational deficit of that body of third agers was not of their own making, but was a consequence of the historical events and social attitudes of the period in which they grew up. It is important to note that these figures are drawn from surveys carried out in the late 1980's. Today's figures would show a higher level of educational attainment for those of 60+, born post 1940, who are just moving into the third age. Unfortunately Carnegie served to reinforce the belief that limited initial education leads to non-participation. This is a dangerous generalisation which this research seeks to refute.

Studies by Antikainen et al (1996), Tikkanen (1998) and Gorard, et al (1999) all indicate that age and limited initial education are not necessarily negative factors when predicting the likelihood of participation in learning. Using life trajectories to study participation patterns they demonstrate that the age-participation relationship is very complex. There are cultural shifts and time related determinants that can influence the learning choices which people make. This is evident in the participation histories of the generations born pre –1940.

Disrupted initial education, war service interfering with job training, separation of families, pressure to seek employment and many other factors specific to the middle decades of the twentieth century, impacted on individual learning patterns. Educational opportunities for those born pre-1940 were limited and yet many of them retained an interest and enthusiasm for learning throughout their lives. Attendance at evening classes, the use of public libraries, involvement in Workers Educational Association and other learning organisations in the post-war years all attest to the commitment of certain sectors of that generation.

For each individual there is a complex interplay of factors that may lead him or her to participate in learning. Gorard et al (1999) indicate that school-based qualifications are not particularly significant but that background, life experiences and changing opportunities are determinants of participation or non-participation. Similarly, Tikkanen (1998) claims it is less important to consider the effect of age than to seek to understand the underlying processes and mechanisms that influence participant behaviour. The contention that being old is a likely indicator of non-participation needs to be re-examined. We need to understand the processes that lead older learners to participate – take cognisance of how older people view their learning needs and the meanings that they attach to learning.

There is an echo of these concepts in Withnall (2000) who seeks to put the perspective of the older learner at the centre of research and provision. She suggests that the agenda has been set by the practitioners who far too often display no real understanding of the complexity of the motivations to learn of their students. Learning for the purpose of upgrading skills is but one aspect of

students' aims. By engaging with older students and seeking to understand what draws them towards learning, practitioners might achieve better-targeted provision and attract a wider student profile.

There is a need to understand the meaning of learning in older people's lives and the basis on which they make their choices. How are those choices influenced by social, economic or cultural factors? What events and beliefs over the life course have led them to learning in later life? Do they have a history of lifelong learning or have they discovered learning in later life. How do they perceive the impact of learning on their daily lives? Essentially we must try to understand the learning experience from the stance of the participant rather than that of the practitioner. We need to put faces on those who are participating. Raw statistics tell us nothing about the characteristics of participants. Profiling those who are participants can perhaps give pointers to the strengths and weaknesses of different types of provision and indicate ways of widening participation. To concentrate only on reasons for non-participation is a negative approach to attracting a wider range of participants.

The ongoing NIACE Older and Bolder project has gathered statistical information on participation by the 60-90 age group, in both formal and informal learning. It is looking at learning not only of active third-agers but is also researching learning in care homes by members of the fourth age. Walker (1998) limited her mapping exercise to one organisation: the University of the Third Age. The aim of the exercise was to investigate the possibility that participation in informal learning might lead to a progression into the formal sector. The findings however suggested that, although some older learners might be encouraged to formalise their studies and follow accredited courses, the majority were content to remain within the informal sector, enjoying learning for its own sake, particularly valuing the social context. Data was collected on other aspects of learning in the third age, e.g. subject preferences, age range, educational background, involvement in other organisations, and reasons for choosing the informal sector. Whilst providing an interesting overview of seven groups of U3A, it is doubtful if the findings can be generalised to all older learners. U3A has a strong self-help ethos and its members are untypical of older learners.



## **PARTICIPATION THEORIES**

When we examine participation theories we find that many are generated from studies of adults of working age. They attempt to explain participation or non-participation in further and higher education or in work-related training. Theories concerned with 'perceived needs to progress in the work domain' break down if applied to third agers; nor is this age group likely to respond to a 'dynamic for upward social mobility' (Hedoux in McGivney 1990 p.98).

A useful summary of the most significant theories is provided by McGivney (op cit). Some of these have relevance to the behaviour of older people:

- **Life transitions theory**
- **Reference group theory**
- **Social participation.**

**Life transitions theory** takes as its starting point the observation that participation in learning projects is frequently linked to changes in life circumstances, for example: loss of job, divorce, bereavement or retirement. Such events mark a major change in the pattern of life and for many involvement in new activities is undertaken as a coping strategy. Retirement from work, either sought or enforced, is increasingly beginning at an earlier age than in the past. There may be 20 or more years of active life ahead. Following surveys of almost 200 men and women about to retire, Gee and Baillie (1999) identify four patterns of retirement expectation:

- **Transition to old age** – a time to rest, slow down and prepare for ageing.
- **New beginning** – a new phase of life, a time of freedom to tackle long awaited goals.
- **Continuity** – basic pattern of life continues with more time for valued activities.
- **Imposed disruption** – involvement in work is irreplaceable – retirement is meaningless and frustrating.

Among academics there are four major theories relating to retirement: disengagement theory, activity theory, continuity theory, and the theory of retirement as a crisis requiring dramatic adjustments (Talaga & Beehr, in Gee and Baillie 1999). There are notable similarities between the four modes of retirement intentions and these four theories.

Around 65% of those surveyed fell into the new beginning pattern and a further 15% into the continuation category. Those with a positive attitude to retirement spoke of taking up new interests or developing existing ones. Education was mentioned frequently, both as a leisure activity and as a means of seeking information on, for example, financial or medical matters or as an aid to adaptation to a new way of life. Bereavement is often a trigger to seek new social contacts, and to become involved in a learning project. There may be incidental learning through involvement as a carer or a volunteer or in learning to live life alone.

Jarvis (2001) describes transition as a period when individuals learn how to play the new roles attached to their changed status in society. However, lifestyles and roles are no longer so fixed and age-related as in the past. Consequently retired people have become free to structure their lives in any manner they wish. For many this poses a challenge: to learn a new identity and establish a different daily life pattern. Being a member of the workforce confers a sense of personal identity, of status and respect, whilst demands of work give structure to one's life. Jarvis speaks of learning to retire where the process of adapting to life in retirement becomes in itself a learning experience. This process may be more difficult for men. Women typically already have a home-based role as housewife and mother and are accustomed to fitting other activities around their household routine. Men have to develop a home-based identity to replace their workplace identity.

We have ritualised retirement to enshrine a rite of passage to a different life. A leaving party, the sending of cards and presentation of special gifts, mark the event and the retiree is despatched to the wider society. Unfortunately there is no ritual to incorporate retirees into their new status; they have to devise their own

way (Jarvis 2001). Perhaps taking the step to join an organisation for retired people, such as the U3A, serves as an initiation ceremony, a welcome to the next life phase.

**Reference group theory** suggests that individuals identify with the social and cultural group to which they belong – ‘the normative reference group’ or to one to which they aspire to belong – ‘the comparative reference group’. Gooderham (cited in Benn 1997) asserts that an individual’s current situation should be given consideration when looking at participant behaviour and not simply seek explanations of non-participation in terms of gender or low social class or limited initial education. People tend to behave in the manner of those with whom they associate. If involvement in learning projects is the norm for other retirees of their acquaintance then there may well be a positive orientation to follow suit. It may be that belonging to an organisation such as the U3A is considered as appropriate behaviour amongst retired people of a particular cultural background. Members of the U3A frequently speak of their pleasure in being with ‘like-minded people’. Gooderham cites social origin, current normative reference group and a positive attitude to learning as being indicators of participation; all of these are applicable to members of the U3A. One could also add lifetime experiences that may have engendered a disposition towards learning.

However, more complex personal or situational variables also operate. There may be a question of availability of appropriate courses that are easily accessible. Few older people are willing to travel outside their immediate neighbourhood in pursuit of particular courses and will settle for what is available locally. The opportunity for social interaction is a factor for many older people, especially for those living alone. For some third agers learning is not undertaken deliberately but is incidental to other activities. Work as a volunteer or a carer can lead to the acquisition of skills hitherto unknown. Serving as a member of the committee of a pensioners’ organisation may produce a rapid growth in knowledge of welfare legislation and administration. What is evident is there is no simple formula that will account for the motivations of individual learners.

A further manifestation of reference group theory is evident when considering the growth of consumerism and its promotion of leisure as part of a retirement lifestyle. Formal learning may appear frightening, especially if previous experience was associated with failure, but learning, as a leisure pursuit in a social context, could be attractive. Learning permeates spare time and leisure activities such as reading, television, museum and gallery visits, holidays and outings to places of historic or architectural interest. Magazines targeted at third agers are promoting an active lifestyle. McKie (1999) hopes that we are moving away from previous stereotypes of ageing and that it is becoming acceptable for older people to indulge in activities once considered the preserve of the young. Chronological age is a poor guide to a person's physical or mental fitness and is increasingly being discounted as a determinant of decline into an impoverished lifestyle. The pursuit of leisure activities, including learning is beginning to be considered appropriate behaviour for older people. Perhaps we are seeing the development of new normative reference groups.

### **Social participation theory**

Evidence is emerging of a strong link between **participation and social activism** (Benn 1997). It was also noted by McGivney (1990) that participation in learning tends to be higher amongst those who are active in social and cultural, organisations. A survey amongst adult learners in South West England, in the formal sector, revealed that 58% of the respondents were involved in activities in the community, ranging from trade unions, churches, pressure groups and voluntary work. The older the respondent the more likely were they to be engaged such activities. There seems to be a learning spin off from membership of an organisation, which can then lead to other learning activities. It is also suggested that involvement in the local community facilitates access to information networks and entry into a social strata where learning is the norm. It may be that typical participants are simply participants in a wide range of activities in the community, of which learning is but one.

It is far from clear why people are motivated to join such organisations and why they choose to become involved in learning. Once compulsory education is completed learning becomes a discretionary act, especially for older learners

who are not seeking advancement at work. They are choosing to accommodate learning amongst many other activities and we should be asking what purpose it is serving. For many of those interviewed in this study, learning in U3A was being used as a means of facilitating social contact. The subject being studied was of secondary importance to the opportunity for social integration. Commitment to learning would be sidelined if other demands on their time arose.

These theories: life transition theory, reference group theory and social participation theory can all be demonstrated have some relevance to third-age learning but there is still little understanding of the significance of learning in older people's lives or the value they place upon it. Recent studies have moved towards looking at participant rather than non-participant behaviour (Walker 1998, Gaskell 2000, E.S.R.C Growing Older Project 2000-2002). This positive approach is to be welcomed. It is necessary to develop new theories of participation, which can encompass the complex values and motives that lead people to learning in later life. We can draw upon life transitions theory and reference group theory but we must also seek to understand how people are using learning as they adapt to the aging process.

## **AGEISM AND THE ROLE OF GERONTOLOGY**

The structured ageism of our society was well illustrated in the Census of 2001. Those over 75 were not required to enter details of their previous working life (or if indeed they were still working, as many of them are), nor of any qualifications they may have obtained. The message sent out is that if you are over 75 you are invisible and of no consequence. This was the census which revealed that 21% of the population is over 60.

### **Negative stereotyping of the elderly**

Education policies and practices have been informed by ageist stereotypes resulting in impoverished provision that fails to take into account individual needs and diversity (Elliott 2000). Ageing is almost always presented as a problem. There is concern over the escalating costs of caring for the increasing number of older people in terms of health care, pensions, residential care. The elderly are regarded as a burden on the taxpayer, economically inactive,

requiring the support of a shrinking workforce. Societal beliefs and stereotypes, that are largely negative, influence current views and expectations of old age. Popular discussions of ageing are generally constructed in negative terms characterised by decay, illness, helplessness and dependence, all combining to produce a deficit model of ageing (Elliott *ibid*). Carlton and Soulsby, drawing attention to the dangers of ageist stereotyping, emphasise the terms generally used to describe the elderly:

For the past thirty years or so, the focus has been on the younger generation, and older people are seen as obsolete, past-their sell-by date, and an economic burden to be borne.

(Carlton and Soulsby 1999 p.2)

Such negative expectations risk shaping the conceptual orientation of researchers into old age.

**Gerontology**, the study of ageing, is a relatively young science. It has attempted to clarify what old people can or cannot do, but the nature of 'normal' ageing is proving to be an elusive concept. Longevity as a mass phenomenon has only arisen in the second half of the twentieth century. For the first time in world history we are beginning to see societies where older people will outnumber the young. The study of ageing is only at the exploration stage and there is no long-standing tradition of a culture of old age on which to draw. The post-work period for many could be as long as their working life and yet these changes in the balance of the different life stages and the consequent cultural and social outcomes of these changes are unexplored territory (Blaikie 1999).

As more people move into old age its categorisation has become more problematic. There is great diversity of purpose and aspiration within the older population, whose age range covers thirty years or more. This would suggest the need for many categories to reflect this diversity and yet there is a tendency for older people to be treated as one homogeneous group. It can be argued that gerontology as a study is in danger of strengthening this stance, although gerontologists would declare that such is not their intention. Gerontology in its

many aspects: medical, biological, psychological, and sociological should not confine itself to enumerating and exploring the problems of ageing and the descent into senility; rather it should seek ways of promoting ageing as a positive experience.

Gilleard and Higgs (1998) identify three distinct strands in contemporary gerontology and its approach to ageing:

- **The bio-medical approach** – seeks the key to successful ageing through adaptation to changing mental and physical circumstances, through preventative medicine and through healthy life-style.
- **The social constructionist perspective** – social policies have led to the structuring of old age as a deprived social category. The resultant deprivation accelerates ageing.
- **The morality approach** – claims a respected status for old age. Decline must be accepted and the elderly allowed to round off their life in dignity.

### **The bio-medical approach**

Negative expectations about old age derive from the biological sciences where ageing is defined as that phase in life when the biological systems lose their efficacy in functioning, when the range of adaptivity decreases and the organism becomes less effective and more vulnerable. **Disengagement theory** (Cumming and Henry in Gilleard and Higgs 1998) similarly emphasises deficiency and deterioration, where ageing is seen as a gradual and inevitable withdrawal from both physical and emotional involvement as a preparation for death. Such definitions serve to shore up the discourse of decline, decrepitude and dependency and provide justification for socially excluding the elderly. For some, physical and mental decline means that disengagement from life is forced upon them. There are others who have chosen to disengage; confronted with a rapidly changing world they are weary of continually adapting to new ideas or philosophies. They are the 'harmony seekers' who have:

spent their lifetime seeking to construct a self and a system of meaning that enables them to be at peace with the world and to end their days in harmony with it.

(Jarvis 2001 p81)

Harmony seekers are not necessarily very old; there are those who disengage early in life. They are not to be despised or pitied for they have come to terms with their existence and appear content. They are however a minority. As noted earlier, research by Gee and Baillie (1999) indicated that 80% of prospective retirees, expected to carry on being active and to be involved in learning in the post-work period. Not only are they learning how to retire, they are pursuing new interests and adjusting to the new knowledge. These are 'the sages' (Jarvis 2001) for whom life is still an intellectual adventure. They have time to be reflective learners, to be critical. They have time to relate the new information to their previous life experiences and continue to grow and develop as human beings. Here is the model for the typical member of the U3A, determined to delay disengagement for as long as possible. Jarvis also identifies 'the doers' who are determined to keep themselves busy. They avoid disengagement by remaining active as volunteers, as gardeners, travelling, indulging in sport and a wide range of leisure activities. However, neither activity nor disengagement theory can adequately account for individual differences in the experience of ageing.

Biology is not a good friend of old age; physical ageing cannot be avoided completely but it can be delayed and we can learn to adapt to it. Evidence is emerging from the Berlin Ageing Study that deficit breeds growth (Baltes and Graf 1996). It may be a special strength of human culture and individual behaviour that conditions can be generated which enable people to adapt to their increasing biological limitations and to acquire new coping skills. Limitation or loss can generate new forms of mastery and innovation. The nature of human ageing is not only biological but also cultural. Cultural and social factors may influence how individuals cope with biological decline. Here we see links with **social gerontology**. Some people will age more successfully than others, the ability to adapt to old age being profoundly influenced by maintaining interactions and transactions within the cultural environment.



The concept of 'ageing successfully' (Baltes and Graf 1996 p.452) challenges negative stereotyping of old age and researchers are moving towards establishing criteria and strategies for successful ageing. Amongst recommended strategies may well be involvement in formal or informal learning activities which encourage mental stimulation and facilitate social interaction. If this be the case, there will be calls for easier access to learning for third-agers. This in turn will necessitate changes in attitude amongst adult educators who have been slow to understand the needs and motivations of older learners.

The bio-medical model suggests that we are not programmed to die (Kirkwood 2001). The primary cause of ageing, according to Kirkwood's disposable soma theory, is the gradual build-up of faults in human cells and organs. Senescence results from limited investment in the maintenance of the body (Kirkwood and Ritter 1997). Sensible life style, preventative medicine, improved treatment of disease, and the harnessing of technology could achieve an improvement in how we experience a prolonged later-life. These ideas feed into the prolongevity model of ageing which regards ageing itself as a disease which can be avoided (Moody 1995). Good diet, healthy living and effective health care set us on the path of anti-ageing. There are no limits; mind and body can be renewed; we need not accept the inevitability of senile decline. Such is the over-optimistic ethos of the recent epidemic of self-help books offering strategies for rejuvenation and eternal youth (Gilleard and Higgs 1998). However these works are not offering some magic potion - the way we age lies in the hands of the individual, in genetic heritage, the choice of life style and in the social and cultural resources available to us.

### **Social constructionist perspective**

The bio-medical discourse offering hope to older people sits uneasily with the discourse of structured dependency propounded by some social gerontologists. Social disadvantage is seen as an intrinsic feature of ageing. Much of what we accept as ageing arises from social practices and expectations rather than from physiological ageing. Physical decline is accelerated by unfavourable social conditions. Compulsory retirement policies remove older people from the labour

market and deny them a role in public life with a consequent loss of economic and cultural value. Retirement denotes the beginning of old age and the term pensioner is used as though it were synonymous with 'old frail person'. State pensions policies push many older people into poverty where lack of consumer power restricts their access to social goods and services. They are thus set apart from mainstream society and old age becomes a social category alongside other disadvantaged groups (Gilleard and Higgs 1998). This somewhat extreme stance, within which older people are treated as a homogeneous group, leads to policies being formulated on the basis of 'one size fits all'. Whilst some pensioners would acknowledge their membership of a deprived social class, many others would not. There are wide differentials of class, gender, income, education and levels of access to information. All of these impact on the way old age is experienced.

Arguing from the basis that social disadvantage accelerates ageing and adds to its problems, structured dependency theorists seek to identify and contest policies which selectively impoverish older people, for example: compulsory retirement, index-linked pensions. Given that chronological age is an unreliable guide to physical or mental fitness, a flexible approach to retirement would be more appropriate, with safeguards for those who might risk exploitation. Means should be found to allow the voice of older people to be heard when health and social policies are being discussed. Critics of structured dependency theory point out that attempts to view old age and ageing as socially constructed, mask the historical power differentials of gender, income and property. Those who seek to reverse such differentials have a propensity to demand unlimited funding. It could be argued that ultimately no amount of money can prevent ageing and that strategies to redistribute resources towards the elderly produce limited returns. Indeed increased longevity in later life could be offset by the increasing infirmity of the survivors.

### **The morality approach**

Contesting never-ending calls for expenditure in order to restore justice and remove the handicaps of old age, we find a discourse which argues for the material and moral necessity to place limits on what society owes to those who

are old. Age and decline must be accepted, the fading of life be normalised and the dignity of dying be re-emphasised, (Moody 1995). There should be a reduction in the level of techno-economic investment in the later years of life, taking into account the limited returns on such efforts. This perspective also encompasses those who favour the deliberate limiting of health care for the very old, as well as the promotion of euthanasia, supporting the view that individuals should be able to choose the time and manner of their dying (Humphry 1991). There is a rejection of the bio-medicalisation of the elderly and complaints against the insensitive technocrats who keep people alive in spite of their poor quality of life. However Moody is not advocating a Luddite rejection of technology and a desire to return to earlier simpler ways, rather he is seeking a discourse which can make sense of and give meaning to ageing and dying.

### **Leisure and consumerism: the antidote to ageing?**

Do any of these discourses offer strategies to combat ageism and the negative stereotyping of older people? The longevity theorists, who regard ageing as a disease that can be combated, advocate preventative and rejuvenatory strategies. It is implicit in this thesis that the experience of ageing lies in the hands of the individual and all that is required is a modification of lifestyle. There has however been little guidance for the conduct of an aged life. What is appropriate behaviour for retired persons? Ageing is a social construct and age-related expectations are affected by the prevailing social norms. Until recently many older people have tended to conform to the stereotype of creatures descending into decay and decrepitude. The 21<sup>st</sup> century is likely to see rapid changes in attitudes to ageing and how older people conduct themselves. Social policies around retirement and pensions have helped to crystallise old age as: 'a new distinct phase in the life cycles of most people, *a period of post-employment leisure*, preceding by many years the onset of marked physical decline.' (Harper and Thane 1991: p.59)

For some, however, retirement can be a period of instability and loss of identity (Phillipson 1998). This is especially the case for male retirees who often define themselves by the employment in which they engaged. Retirement brings with it the challenge of creating a new lifestyle and a new social identity. Blaikie (1999)

believes that older people are being offered a retirement lifestyle where the emphasis has shifted from issues of sickness and decline towards health and liberation. Gilieard (1996), demonstrating how the identity of older adults is being refashioned by consumer culture, pursues a similar theme. Third-agers are being targeted by marketing and business journals offering them retirement homes, holidays for the 'young at heart' and a wide range of leisure activities. Consumerism can offer a new pluralistic culture for later life. It can offer the prospect of buying time, spending one's retirement in the sphere of physical culture and self care (Gilieard and Higgs 1998). But there is a warning: factors of gender, class, ethnicity and geographical location all impact on the third age experience. Not every one has the means to buy into the consumer culture and inequalities are inevitable.

Wearing (1995) suggests the possibility of contesting the negative images of ageing through the discourse of leisure. Making leisure choices is challenging the thesis of structured dependency and the social construction of old age. Older people are thus presented in a positive light. When applied to the older person leisure emphasises what a person can do rather than what they are no longer capable of doing. Through making consumer choices they are both reacting to and contributing to a developing culture of old age. Even those older people who hesitate or who are unable to participate in this new culture will have a more positive vision of what life in retirement can be. Consumer culture offers the chance to free oneself from the discourse of decline and dependency claims McKie (1999). She suggests that lifestyle choices are not necessarily materialistic and contends that ageing individuals who behave as discriminating consumers and active learners are seizing an opportunity to redefine their personal identity.

Consumerism is not the only force challenging ageist stereotypes. Attitudes and values can change, and the newest generation of retirees, particularly the more affluent of those born after World War 2, appears not to conform to the stereotypes. They are better educated, have higher expectations and are creating a new third age lifestyle. Elliott (2000) describes this attribution of attitudes and values to a particular age cohort as **generational theory**. Others use the term

**cohort theory** (Glenn 1977, Gorard, et al. 1999) and Gaskell, T. (2000 p.84) speaks of 'a collective generational self image'. Each age cohort has a common body of cultural, social and historical experiences as well as a shared initial education. It is however important to recognise variability within age cohorts dependant upon gender, class and socio-economic status. The interviewees in this study were grouped by age cohort and cohort theory will be considered in more depth in the Methodology section.

### **Educational gerontology**

Phillipson (1998) makes a strong case for learning as part of this new culture for later life. Without effective educational provision, he argues, the years of retirement are substantially wasted. However, Elliott (2000) fears that educational gerontologists are influenced by populist ageist stereotypes when conducting their studies, many of which start from an ageist stance. Withnall (2000) suggests that educational gerontology has yet to understand the learning needs of older people. It may even have helped to reinforce ageism. Working largely within the functionalist paradigm, deriving from **role change theory** and **activity theory**, educational gerontology has tended to problematise ageing. Role theory suggests that in retirement older people must adjust to a loss of role and adapt to a changed function. Activity theory sees later life as a period with potential for personal development and renewed social relationships. Successful ageing is interpreted as learning to come to terms with the changes that ageing brings.

Two aspects of educational gerontology can be identified: the first is a form of education specifically targeted at older people and significantly different to that offered to younger groups. The second is some kind of remedial education for practitioners to re-educate them in best practice when seeking to alleviate the problems associated with old age (Elmore 1999). A third role might be to combat misinformation about older people. The approach of most educators of older adults has been interventionist. Debate around appropriate provision for older people has most frequently concerned itself with suitable activities for the disadvantaged or socially excluded. Study programmes are set up in centres for older people, usually within welfare provision. In this model older people are

seen as dependent and in need of help. Learning activities will keep them occupied and it might be possible to provide some remedial instruction so that they can care for themselves and understand medical instructions. Funding can be justified if it can be demonstrated that as a consequence of their learning activities they make fewer demands on social and health care services (MacKeracher 1998). This is an extremely utilitarian stance which has led to a business approach to ageing. Surely Schuller and Bostyn (1993) had more ambitious learning aims in mind when they suggested in the Carnegie Report that it makes economic sense to keep older people fit and active by providing opportunities for learning.

**Health benefits of learning in later life.** There is an implicit assumption that education can confer health benefits in later life although there are few hard studies to support this thesis. Government policy documents in the UK are beginning to use this claim as a justification for educational provision for older learners. *The Learning Age* affirmed that: 'learning helps older people stay healthy and active, strengthens families and the wider community, and encourages independence' (DfEE 1998 p.10)

*Learning to Succeed* (DfEE 1999) expressed a similar view and there are assumptions of the health benefits of learning in later life in a DfEE publication: *Learning in Later Life* (Dench and Regan 2000). This latter document reported on motivations to learn and on the impact of learning on older people. Most of the learning reported on was work-related. The age range of the interviewees was 50-71, most of whom were still in employment. (Surely later life extends beyond 71?). The researchers concede the methodological difficulties in measuring improvement in health as a consequence of learning activities. A substantial number of their respondents claimed benefits to health and well-being but these were subjective views. The use of these findings to uphold a claim for the health benefits of third age learning would seem to be of doubtful validity. In general terms the study suggests that the social interaction generated by learning activities was considered enriching by most adult learners. Opportunities to participate in education and leisure activities may well enhance and maintain well-being and independence, but the case for health is not yet proven. The study

did not acknowledge that social interaction could be achieved through a multiplicity of activities of which learning is only one.

Nevertheless, adult educators use the assumption of health benefits to legitimate the introduction of programmes that claim to offer older people choice and opportunity to keep their brains active and healthy. The North American version is mental fitness classes and leadership training that aim to empower older people. Empowerment, claims Cusack (1999), is emancipation of older people from all forms of domination. When asked why older people cannot do this for themselves her response is to imply that they do not realise the extent of their disempowerment and need experienced professionals to guide them. Nowhere does she appear to consult her students as to their learning needs and she assumes the right to set the agenda. Such an approach stems from ageist attitudes and deprives older people of their learning autonomy.

Withnall (2000) warns (following Usher, et al 1997) that the drive for emancipation and empowerment could become a new form of oppression: we have ways of making you participate. Critical gerontologists seem to start from an assumption that older people are a homogeneous group and are uniformly disadvantaged yet it is becoming apparent that there are widening socio-economic differences in the third age. There are also sharp divisions between the fit and active majority and the frail minority suffering acute or chronic illness. There is no single model for how we should treat the ageing population.

The role and responsibilities of adult educators need to be examined. It cannot be assumed that those who teach older people are free of ideological beliefs or are able to approach their task free of negative images of the old. Practices have been influenced by the negative stereotypes of the educability of older adults {"You can't teach an old dog new tricks"}. Educational gerontology has failed to understand the attitudes to learning of older people. Withnall (2000) joins Glendenning (1997) in calling for a move away from the functionalist paradigm and for a re-evaluation of existing practices. We should be asking what kind of provision is needed, why it is needed and whose interests it is serving: the learners or the practitioners?

Shortly before his death, Glendenning (2000) was pointing to a new emphasis in educational gerontology as a distinct field, concerning itself with the education and learning potential of older people. The theories marshalled to justify interventionist practices should be termed gerontological education or gerontagogy and be a separate field of study. It essential to find a stronger theoretical base for educational gerontology and Withnall (2002) suggests that this can be within the discourse of lifelong learning. Is it possible to locate third age learning within a life course perspective? Too often lifelong learning is interpreted as having only vocational importance, whereas it could be a truly lifelong process that is of importance at every age.

It is not at all clear how older people interpret learning and there has been little research on individual learning styles. There are many questions to be asked. What value do older people place upon learning? What experiences over the life course have shaped their perceptions? How have their ideas and attitudes towards learning developed? How do we account for the apparent success of organisations, such as the University of the Third Age, where the members have taken charge of their own learning? Finding the answers to these questions would offer a clearer understanding of third-agers' experiences as learners and possibly move us towards a refinement of the theory of lifelong learning to make it more inclusive (Withnall 2000). These questions are the focus of this research project.

### **ACCESS TO LEARNING AS A RIGHT**

In the Carnegie Report Schuller and Bostyn (1993) asked for a clear statement on the rights of older people to a broad range of educational opportunities. They drew attention to the limited learning opportunities available to third agers and the inequitable distribution of provision. They suggested that older people might have an entitlement to educational opportunities as compensation for lack of these in earlier life and drew attention to the importance of recognising how divides of class and gender had in the past impacted on access to education. Those born and educated in the first half of the twentieth century were subject to



restricted educational opportunities, with the majority having left formal education by the age of 14.

Do older people have entitlement to learning opportunities, asks Edwards (1997)? If the answer is yes, then of what kind, at whose cost and provided by whom? It might be argued that having paid taxes throughout their lives they have a right to expect certain services. Few would deny them health care, or free transport so why not offer education suited to their needs? Withholding access to education might be construed as violating one's rights to be treated as an equal, to have equality of opportunity and to achieve personal fulfilment. Starting from notions of equality of opportunity, of participation in democracy and equality of citizenship, Elmore (1999) argues that social justice demands that all citizens have a right to education. This right is imperative in times of rapid social change to help citizens to adapt to new situations. He sees older people as victims of change, losing political influence and status as both persons and citizens. If they are to retain a meaningful role in a liberal democracy then education is the tool they require.

This image of older people as victims is contested by Elliott (2000) who detects a shift in attitudes, especially amongst those educated post World War 2. Generational theorists suggest the life style of the younger retirees echoes attitudes and values that were assumed during a period of significant social change in the post-war years. In the future there will be a move away from disengagement to empowerment. The young elderly do not foresee retirement as a period of winding down, preparing for death. Rather they have a positive attitude to later life seeing it as a time for self-fulfilment. Many of them are well able to articulate their needs and may seek to influence government policy. Educational policy and practice may then begin to reflect the resilience, potential, experience, diversity and independence of older people as lifelong learners. As demographic changes begin to take effect, the implications of the greying of the population will demand consideration. Organised and politicised third-agers can become the powerful force apparent in the American 'grey panther movement', which campaigns for social justice for seniors.

Withnall and Percy (1994) are suspicious of educational rights advocated from a quasi-political stance, grounded in concepts of equality and justice. They suggest that rather than equal opportunities in the sense of the same opportunities for all, the focus should be on the importance of human dignity, on the fulfilment of human potential and the promotion of fair treatment for everyone. It can be argued that a notion of education specific to older people does not fit easily with ideas of equality of opportunity and has a feel of the ghetto (Elmore 1999). Whilst purporting to be seeking the emancipation of older people this approach is imposing a specific form of education upon them. Thus we return to the danger of educational oppression signalled by Withnall (2000) and Usher, et al (1997).

There are however pragmatic reasons to justify educational provision for older people. What might be the consequences of denying access to learning? Whose interests are served by providing them with learning opportunities? The Carnegie Report (1993) already noted that an ill-informed older population would be unable to benefit from the rapid changes occurring in society and would risk being alienated by the new technology. At a practical level, an informed third age is essential; pensioners need to be able to negotiate their way through the complex field of social legislation and to have access to the latest information on health matters both on their own account and in their role as carers. In addition there is risk of the loss of cultural capital if third agers are denied access to learning activities. They have skills and experience to pass on which form part of our cultural heritage and which should not be dissipated. Finally, condemning pensioners to a life of indolence could have disastrous consequences both socially and economically.

Pilley (1990) warns of the danger of 'a slide into purposelessness' facing older people and suggests that they should be considered as a community resource that can be drawn upon for their own benefit and for the benefit of the community as a whole. Similarly, Schuller and Bostyn (1993) argue for a 'social economy of the third age' that takes into account the actual and potential contributions made by older people. Attention should be drawn to their role as volunteers, carers and grandparents. Their largely unpaid input should be recognised as vital to the

economy. At the same time measures should be in place to ensure that they remain actively involved citizens for as long as possible and that they have access to a full range of cultural activities. Investment in measures that directly or indirectly improve well-being, delay dependency and reduce calls on the welfare services would appear to be cost effective and of benefit to the whole community.

### **WHAT KIND OF LEARNING?**

An earlier section drew attention to the manner in which third-agers have been badly served by the discourses of life long learning and the learning society. Emphases on the economic imperative and the move towards vocationalism, training and workplace learning have left older people on the sidelines. In spite of the rhetoric, in practice the term lifelong has been narrowly interpreted. Elliott (2000) complains that within the discourse of lifelong learning there has been a dominant paradigm of formalisation, privileging formal learning contexts – schools colleges, universities. Government funding and research has focussed on these sectors. A considerable shift of attitude will be required to bring about an acknowledgement that learning takes place outside these settings. It is only very recently that informal learning contexts have been discernible in government policy documents (DfEE 1998 and 1999).

It is argued by Percy (1997) that adult educators need to rethink the boundaries in adult education or perhaps abandon them altogether. He contends that the boundaries between non-formal/informal learning, education and leisure are becoming blurred. Traditionally higher education was for young people to learn academic principles and to prepare for the professions, further education was for young people to learn technical skills and adult education was for adults to undertake general and recreational education. Such definitions marginalize a vast swathe of learning activities taking place outside the recognised framework.

Coombs and Ahmed (1974 cited by Jarvis 2001) categorised a trio of learning situations. These are frequently regarded as being distinct from each other but in essence they merge and overlap.

**Formal education** is relatively easy to define as systems of organised learning, hierarchically structured and chronologically graded, serving society's socialisation and educational requirements. It delivers academic education and vocational, technical and professional training. In this context education appears to have clearly defined bodies of knowledge which are transmitted to each successive generation of students. Education takes place in particular institutions and it has clearly stated aims and measurable outcomes.

A shift is required in our thinking about the organizational units of education, away from schools and colleges where learning is organised and contained, towards the learner, who is an intelligent agent with the potential to learn in a wide range of contexts:

Much adult education will never know itself as such, and will be recognized only by leaders and teachers of real insight. It will go on in clubs, churches, cinemas, theatres, concert rooms, trade unions, political societies, and in the homes of the people where there are books, newspapers, music, wireless sets, workshops, gardens and groups of friends.

(Yeaxlee 1929 p.155)

When we come to examine the interviews collected in this research project, we shall see that learners have a tendency to dismiss as unimportant learning that has taken place outside formal institutions. Yet there is acknowledgement of learning from family and friends, from work colleagues and above all from life experiences, in other words they learned informally. Learning outside formal institutions can take many forms:

**Informal learning** describes a lifelong process whereby individuals acquire attitudes, values, skills and knowledge from daily experience and from the educative influences and resources in their environment, from family and neighbours, from work and play, from the market place, the library and the mass media. Sometimes the learning is **intentional**, that is an individual aims to learn something and goes about achieving that objective. Often there is **accidental/incidental learning** when in the course of

everyday activities an individual learns something that he or she had not intended or expected.

**Non-formal learning** is any organized educational activity outside the established formal system whether operating separately or as an important feature of some broader activity such as voluntary organisations or community groups.

Many types of learning are difficult to categorise. A casual conversation between lecturer and student in the corridor may be of great educational value but was in no way planned to be part of the course. Open and distance learning programmes may be formal in structure but the student may approach them in an informal manner, fitting the learning episodes around other activities and perhaps involving friends and family in the learning process. What is certain is that learning takes place in a multiplicity of settings. Yet learning in the informal/non-formal arena appears to lack status, especially when it is construed as a leisure activity. This factor may partially explain the problems involved in collecting data on informal learning: interviewees frequently discount it.

In which setting can third-age learning find a home? Withnall (2000) suggests that educational gerontology has mistakenly emphasised **education** in later life and that a more constructive way forward would be to focus on **learning**. Some third-agers will seek out formal education and enjoy the challenge of gaining credit for their endeavours, but they are likely to be a minority. It may be that older people's learning sits more comfortably in the social arena or can be dealt with as an aspect of consumerism. It was noted earlier, when considering participation theories, that third-agers are being offered access to a particular life-style. Learning as leisure may well be part of the package and the social interaction offered through this approach to learning will prove to be attractive to a wider range of participants. However, as Withnall (2000) points out, it is not clear how learning is interpreted by different groups of older people, and there is little research that has systematically investigated older people's individual learning styles.

Studies amongst older learners in a variety of contexts indicate that some were uneasy with the hierarchical structure of formal learning situations, feeling under pressure to achieve (Gaskell, T. 1999). Most were happier with informal/non-formal learning where they valued the camaraderie of learning in a social context. The practices of groups like the U3A are a combination of informal and non-formal learning. Most groups will have an established programme of work, but it will be subject to change and adaptation according to the dynamics of the group. There is awareness that deliberate learning is taking place but there is much incidental learning as a by-product of the social interaction which is a feature of this form of third-age learning. The people with whom we socialize provide some of the stimulus for what we learn and how we learn it.

To focus on learning rather than education opens up the prospect of a lifelong process, without boundaries, in which anyone seeking personal fulfilment can engage, at any time, in any place and at any age. It might be a return to a long neglected interest or a decision to embark on something completely new. It can be the opportunity to reflect upon life, either alone or with others, seeking self-understanding and individual insight.

Lifelong learning is not to be equated with lifelong education. The latter is far narrower than the former. (Jarvis 2001 p.22)

Learning as portrayed by Jarvis is a necessary condition for normal human life. It continues across the life span and is the process whereby:

human beings create and transform experiences into knowledge, skills, attitudes, beliefs, values, senses and emotions. (Jarvis 2001 p.10)

This description echoes our earlier definition of informal learning and is a model that situates learning in a social context; learning is an interactive phenomenon, not an isolated internal process. People change and adapt to the situations in which they find themselves, constructing their biography through life experiences as they age and develop. Learning is what makes us who we are.

The emergence of self as a lifelong project resonates with lifelong learning. Antikainen (1998) has demonstrated how people use learning, in its widest sense, to construct their life-course. This is especially valid in periods of rapid change where people are called upon to adapt to new circumstances. Significant learning experiences are identified as those that change or strengthen one's identity. Adjusting to old age, retirement and bereavement are such experiences. Some older people will choose to disengage from life (perhaps the start of the Fourth Age?). For many, life continues to be a challenge; they adopt a positive attitude and continue to develop the narrative of their life. Learning in later life can be a time for third-agers to engage more fully with the project of identity, a quest to give meaning to the ageing process: a kind of reflection and life review as advocated by Moody (1995)

## **SUMMARY**

Third age education is a developing phenomenon but there is insufficient data to enable a reliable assessment of its nature or its extent. Concepts aired in the Carnegie Report (1993) are beginning to feed into policy especially at local level where some authorities are encouraging older people to voice their needs and to have a role in developing learning programmes. However such initiatives are somewhat piecemeal and are not well documented. Indeed difficulties in compiling this review of the literature arose from the fact that most of the research has been from the standpoint of providers and is concerned with the poor representation of older people in formal education. This approach renders most of third age learning invisible. Research starting from the experiences of the older learner would present a more positive view of learning in the third age. The following are the main issues to emerge:

- The discourses of lifelong learning and the learning society have not directly addressed the needs of third-agers, possibly as a consequence of ageist attitudes amongst adult educators and politicians. Older people have been marginalized by policies that emphasise skills for employability and which imply that social inclusion is achieved as a result of being a member of the workforce. Only recently have government policies begun to suggest a role for learning in later life

- The learning activities of 60 to 90 year-olds have been under-represented in participation surveys, most of which have been work-related. Consequently older people figure as a very small percentage of participants. Those over 65 are rarely surveyed. These studies have served to reinforce a negative view of older learners and the full extent of their participation is unknown.
- Studies of informal/non-formal learning have been very limited, largely because of the difficulties involved in collecting data in this area. Yet it may be that the needs of older learners are more adequately addressed within the discourses of learning as leisure, informal learning and learning in a social context. Government policies are beginning to suggest there are benefits to be derived from informal community based learning both for the individual and for the community.
- Knowledge and understanding of the learning activities of older people is very sparse. Educational gerontology has approached the field from the perspective of providers and practitioners, with the emphasis being on intervention and the development of strategies to deal with the perceived problems of ageing. It has failed to consider the values and meanings that older people give to their learning activities. The number of older learners is still very small and raw statistics do not provide information on the characteristics of those who do participate. A methodology is required which can capture the social nature of third age learning especially in informal contexts and at the same time offer insights into who participates and why.
- To focus on learning rather than education may be a more constructive way forward for the expansion of third age learning. The term education has overtones of authority, training, vocationalism, and certification. Learning has a wider connotation suggesting freedom to choose, to take up new interests and to seek personal fulfilment. Investigating the learning experiences of older people through their life course may lead to a better understanding of their motivations to learn in later life.



## **FOCUS OF THE RESEARCH**

A survey of the literature has demonstrated that a negative view of learning in the third age predominates. Studies have repeatedly drawn attention to non-participation of older people in formal education and on the supposed problems of an ageing population. Gerontology has problematized ageing and educational gerontology has sought means of alleviating the problems. There are references to successful ageing and positive views of retirement but little which indicates an understanding of the dynamics of the life of retirees. Few studies exist to show the wide range of activities taken up by retired people or their involvement in learning.

The focus of this research project is to seek an understanding of what learning means in the context of older people's lives, how and why they make their choices.

- It seeks to understand participant behaviour and the settings in which learning takes place. How important is learning in lives of older people? What factors brought them to learn in the informal/non-formal setting of an organisation such as U3A? Has learning made a difference to their life? How important is the social context of learning? What kinds of learning do they value?
- It seeks to challenge the oft-repeated belief that old age and limited initial education are predictors of non-participation. The impact of social and historical events on participation patterns is particularly significant for the current generation of third-agers. How did the constraints of age, class, gender, and location combine with other factors to influence choices and lead these people to become participants? Did early experience of education determine their attitudes towards learning? Were there significant people or events that pushed them towards learning? Has learning always been a feature in their lives? What are the substance, form and social context of significant learning experiences?
- Participation theories, especially life transition theory, reference group theory and links with social activism can be demonstrated to be relevant to third age learners, but a new theory of learning for the Third Age is required which takes cognisance of how older people view their learning needs. There is a

need to clarify the meanings third agers give to learning and its importance in their lives. At a time when the experience of retirement is being re-shaped it is important to attempt to understand the underlying processes and mechanisms that determine how people use their later years.

### 3. METHODOLOGICAL CONSIDERATIONS

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Introduction

Questionnaire

Life histories/ biographies

Age cohorts

Case selection

Interviewing and the interview schedule

Approaching data analysis

#### **Introduction**

This study aimed to examine the role of learning in the lives of older people and to seek to understand the meanings that they attach to it. It centred on life histories and the learning experiences of a sample of third age learners, all members of one branch of the University of the Third Age. It sought to link past learning events with present attitudes to learning and attempted to understand ways in which social, historical and economic circumstances and life events impacted upon decisions to participate. A further aim was to challenge the thesis that old age, coupled with limited initial education is a predictor of non-participation in learning activities. A subsidiary purpose was the gathering of information about the U3A group from which the sample was drawn, to give an overview of the nature of the group and its membership.

Two types of data were required for these purposes:

- Quantitative data - generated by responses to a questionnaire, providing statistical information.
- Qualitative data –generated by face-to-face interviews, providing material for the construction of life histories.

#### **Questionnaire**

The first research instrument used was a questionnaire [see appendix i]. Its initial function was to serve as an orientation exercise in the field for the

researcher by building a broad picture of the local U3A organisation from which the interviewees were to be selected. It produced information on:

- age range of the membership
- gender balance of the organisation
- age at which full time education ceased
- occupation before retirement
- extent of involvement i.e. number of study groups attended
- attendance past or present in other learning activities
- perceptions of the U3A
- participation in other organisations and activities.

Additionally the returned questionnaires were used to identify and select potential interviewees, the aim being to have representatives from different age cohorts, a range of occupations, and breadth of interests. Other criteria for selection were a variety of educational backgrounds ensuring inclusion of some with minimal schooling, that is those whose education ended at the statutory leaving age.

A third function was to aid the establishment of a rapport with the respondents and to ground the interviews. A layer of understanding would be already in place before the interviews began and the framework of the questionnaire would enable the interviewee to feel more secure, being aware of some of the areas the interview was likely to explore.

The questionnaire was a modified version of one that had been piloted previously when the management committee of the group used it to survey the membership. Questions concerning transport, postcode, and suggestions for the local organisation were dropped, as they were not relevant to this study. The question on age was reformulated as a request for date of birth when it was noticed that there was an unwillingness to reveal numerical age. A similar questionnaire had been used by NIACE when collecting data for their Older and Bolder Programme (1998). They had sampled 400 members of this same U3A

group. There was a close correlation between their findings and the data produced in this current study. Correlation was also found with a national survey carried out amongst 90 U3A groups by the Third Age Trust in Spring 2001, with a sample base of just over 3000 (Third Age News Summer 2001).

One hundred and fifty copies of the questionnaire were distributed at a variety of meetings: monthly lecture, current affairs group, and two small language groups. These particular groups were selected because of ease of access but also to ensure a reasonable spread of different subject interests. It was explained that the purpose of the questionnaire was to collect information about the organisation and its members. The forms were distributed randomly, completed during the coffee break, and returned at the end of the meetings. Administration of the questionnaire in situ ensured that clarification of questions was available, if requested and a high level of return was ensured. A total of 120 questionnaires were returned, representing a random sample of 10% of the overall membership. The questionnaires were answered anonymously but the membership number was requested. At a later stage, when the returned forms were used to select potential interviewees it was possible to identify the respondents by their number on the membership list.

More than 60% of this sample were beyond the age range normally covered by national surveys. Older people are usually defined as people over 60, (in some cases over 50!). Market researchers are instructed to interview 60-65 year olds for the elderly category. When a wider range of ages is sampled it is unusual to differentiate between 60 year-olds and 90year-olds.

The data generated by the questionnaire provided a useful statistical image of this U3A group and its membership [see Section 4]. It was a practical starting point from which to select the cases and served to ground the subsequent interviews. It was however a very broad picture. The figures do not reveal what kind of people these are, why they have become participants or the significance of learning in their lives. The creation of a learning life history for each interviewee proved to be a more productive tool, offering access to people's thoughts and memories, expressed in authentic language and producing much

richer data. This approach enabled an examination of motivations to learn, of meanings placed upon learning and of its importance in older peoples lives. In addition, by re-constructing the educational life history of the subjects, it was possible to track the events, beliefs and socio-economic circumstances that shaped present attitudes and which led these people towards learning in later life.

### **Life histories/biographies**

Biographies are becoming an increasingly popular method in education research (Antikainen et al 1996, West 1996, Merrill and Crossan 2000). They provide a framework for studying the subjectivity, complexity and context of human behaviour. The participants are placed at the centre of the research process and are able to reflect upon and interpret past events and experiences. Previous research on participation and non-participation has relied largely upon analysis of quantitative data (McGivney 1990, Beinart and Smith 1997, Dench and Regan 2000). Such studies have highlighted the categories of people who are least likely to participate and possible factors contributing to non-participation. Statistical models of human behaviour are factual and neutral, but they do not reveal the social reality of people's lives or attempt to explain why they are behaving in a particular way. Older people have figured in statistical tables in such small percentages that it is almost as if they do not exist. Statistically older people can be shown to have limited initial education but the tables cannot explain the social and economic factors that produced this situation. Nor can they show how those older people were able to utilise their limited formal education in the construction of their life course. Quantitative data produces an incomplete picture whereas research that is grounded in a concern with meaning and with relevance rather than measurement and typology can change the perspective from which we seek to understand the experiences of older learners.

A life history can be described as 'the life story located in the social and situational context' (Antikainen 1998 p.229). Motivations to learn and decisions to participate are determined by a complex interplay of reactions to cultural, social and economic factors. Gender, ethnicity, historical events, as well as a personal disposition to overcome barriers, all impact upon the decision to participate or not. In narrating their life story and reflecting upon past events the

men and women in this study revealed how experiences of schooling, family, marriage, employment and historical events shaped their lives. Their life histories offered them, and the researcher, an insight into the complex processes that had led to participation in learning at various stages in their lives:

People live lives with meaning. Interpretative biography provides a method which looks at how subjects give subjective meaning to their life experiences. (Denzin, 1989 p.14)

Withnall (2000) encourages the use of life histories as a means of illuminating the opportunities and constraints of age, class, race, gender, location and other factors that influence learning choices in later life. Such research, she suggests, can move us towards a refinement of the theories around lifelong learning, making them more inclusive of post-work learners. However she also warns of the complexities of the task and the necessity of taking a holistic approach to the lives of older people. Their lives are multidimensional and factors such as gender, marital status and family commitments all impinge on their learning activities, which in turn are influenced by a complex interplay of individual characteristics and circumstances. Qualitative data is able to illuminate that complexity and attempt to disentangle it.

It is argued that biographies are more than personal accounts of individuals (Merrill 2002). They also furnish collective data about groups of people in specific social and cultural situations and give insight into the interaction of agency and structure in shaping people's identities. Biographies locate individuals or groups within social and historical contexts, illustrating the constraints of structure on people's lives. Similarly:

Biographies are wider than the individual: an autobiographical recourse necessarily touches upon the social identity aspect. We do not simply learn from biographical stories just for our life-worlds and ourselves: we gain insights into culture, society and history. (Alheit 1992 p.199)

Whilst allowing that the life history approach can offer valuable insights into the social, cultural and historical contexts within which the motivations and learning behaviour of individuals or groups develop, doubts must be expressed about the generalisability or transferability of the data produced by this particular study. The cases studied are not typical of all older people, or even of older learners. They represent a particular social milieu whose members have chosen to learn in an organisation (U3A) with its own distinctive self-help ethos. Other older learners may have chosen a different destination, preferring formal provision or self-directed learning. The majority of older people have chosen not to be involved in organised learning. Although acknowledging difficulty in accounting for its popularity, some working in the field of adult learning regard the U3A as a success story (Blaikie 1999, Withnall 2000). The organisation provides an interesting phenomenon. Positioning itself outside formal education it promotes learning as a social activity in informal settings. The learning can be highly structured, but the structure is not imposed by an external provider. Rather it emerges from the needs of the students, evolving as the course proceeds. The stories of these particular learners offered insight into the appeal of study in a social context where the participants set the agenda.

Although narrow in its choice of cases, this study is able to highlight cultural, social and economic changes of the twentieth century and show how these historical events impacted on the learning habits of the current generation of third agers. It also draws attention to the appreciation by these individuals of learning as a group activity outside the established educational institutions. However Giddens (1994) warns that patterns of human behaviour are not predictive. Future generations of third-agers may not behave in the same way as to-day's third-agers. Even within the short span of twenty years covered by this sample, some generational differences were apparent. Researchers can produce retrospective observations and provide explanations of what has happened. However, it being the nature of human beings to react to situations, amending and transforming them, it is never possible to predict accurately how they will behave in the future.



## **Age cohorts**

The trigger for approaching this research project through life histories was work in Finland by Antikainen and his colleagues (1996). This was a wide-ranging study that looked at the meanings ascribed to education and learning in the lives of Finnish people. Life histories were compiled of 44 men and women, representing different social classes, ethnic groups and across three age groups. The study drew attention to the generational differences accorded to the meaning of education, and demonstrated how these meanings were constructed in the context of major social changes. Although the focus of my research is much narrower, concentrating only upon older people and their attitudes to learning, the methodological approach employed seemed appropriate: to explore meaning as a path towards understanding participation behaviour in older adults. Antikainen's subjects were divided into age generations: older generation, middle generation and younger generation. The older generation (the oldest subjects were only 66!) provided the strongest indication of how social and situational contexts impact upon the learning choices which people make during their life span.

Antikainen's generations were fairly broad categories. Other researchers (Gorard et al 1999, Gaskell, T. 2000) have narrowed the categories into 'age cohorts'. Age cohort refers to a group of people of roughly the same chronological age. They will have common experiences of cultural, social and historic events, although individuals will have reacted differently to those experiences. They are likely to have experienced similar forms of initial education and consequently may attribute similar meanings to learning, particular to that age cohort. Laslett (1989) refers to people sharing the same 'time-space' having a common body of experiences that they have lived through together. Bruner (quoted in West, 2000) observes that the prevailing culture penetrates the psyche, shaping what people think and feel about themselves. There are structural limitations imposed by our social and ethnic origins, by our gender and by the era in which we live (Stanley 1993). In addition, Alheit (1994) asserts that each individual brings his or her personal disposition to the structures of the time.

The use of age cohorts makes it possible to establish whether there are historical time-related determinants of participation as proposed by Antikainen et al (1996) and Gorard et al (1999). Some cohorts will have been exposed to severe social or economic upheaval and as a consequence some may have had limited access to education. There may be culture shifts relating to what is appropriate to a particular social group at a particular time. For the individual there is the consideration of their own experiences and background, their social class and gender together with their personal disposition towards the changing opportunity structures. This present study detected significant differences in attitudes and aspirations between the women in the youngest and in oldest cohorts.

### **Case selection**

Given that historical events will probably impact differently according to the age attained when an event occurs, the interviewees were selected initially to represent three generations or age cohorts. Twelve cases were selected from respondents to the questionnaire to give a spread of ages and a variety of early educational experience. The aim was to have representatives of a range of initial educational backgrounds, some with post-school formal learning, some with minimal education and some with disrupted schooling. The last two factors are frequently cited as indicators of non-participation. The gender balance of three men and nine women reflects the gender balance of the national membership of U3A.

The current generation of third-agers is frequently described as the wartime generation, their lives having been disrupted by World War 2. They were also subject to the social, cultural and economic upheaval of the inter-war years and then to the profound social changes of the post-war years. The use of age cohorts made it possible to study age-related responses to these social, economic or historical events. It was also possible to identify cultural norms for particular social groups at specific periods of time.

The oldest person selected was born in 1915 and the youngest in 1935, thus covering a span of twenty years. Initially the subjects were distributed in three cohorts as follows:

- **Born pre-1920** ~ the generation likely to have had the shortest initial education and to be well established in employment before the outbreak of WW2. Early adult life was probably disrupted by the war. Economic situation in the 1930's may have restricted employment choices.
- **Born 1920-29** ~ the majority of this cohort is also likely to have left school at 14. They were likely to have suffered disruption of the early stages of their working life. For some the war might have brought career opportunities – women in jobs previously performed by men – young men leaving home for the first time.
- **Born 1930-39** ~ this cohort probably suffered disruption to initial education during the war, but some would be able to take advantage of increased educational opportunities post 1944.

The original three cohorts were expanded to four when, after the early interviews, it became apparent that there were significant differences in the youngest cohort between those born before 1933 and those born after 1933. The youngest cases selected were affected by the changed opportunity structures brought about by the Education Act of 1944, which introduced a tri-partite system of secondary education. The immediate post-war years also saw the beginnings of a shift in attitudes to girls' education within a changing social, economic and cultural climate.

### **Interviewing and the interview schedule**

Twelve semi-structured interviews were taped and later transcribed. Each interview lasted approximately one hour and took place either in my home or in that of the subject. The aim was to have a comfortable, familiar and relaxed environment where the presence of the tape recorder was soon forgotten. Assurance of confidentiality and anonymity was given. All interviewees were offered the opportunity to listen to the recording and to comment upon or correct it; all but two declined. Those who listened to the tapes were more concerned to assess their performance rather than to check the accuracy of their statements. All claimed to have enjoyed the experience and expressed willingness to be

interviewed further if necessary. Field notes were written immediately after the interviews. Transcription followed later.

The semi-structured format was chosen in preference to a structured standardised interview. The latter would produce data that is tightly controlled and which can be more readily analysed. Indeed the questions can be framed with a view to facilitating analysis. The semi-structured interview is more flexible. Whilst working within a prepared topic guide it was possible to change and modify the questioning as the interviews progressed. Some interviewees were more forthcoming than others but it was possible to gently probe and encourage disclosure from those who were more reticent. In this manner it was possible to clarify motives, and to reach some understanding of the operation of social and cultural influences. The outcome is much more significant, thicker data from which to generate hypotheses and theories (Gaskell, G. 2000)

There were many questions to which I was seeking not necessarily definitive answers but illumination. What events, discourses had shaped their attitudes to and perceptions of learning? How had they adapted to historical events and social structures and had these helped or hindered their learning? How did they feel about their early educational experiences? What were the influences of social class and the prevailing culture on their educational choices? Did gender or position in the family make a difference to their learning patterns? Were their learning activities connected with employment or did they result from leisure activities? Have they always participated in learning or is it an activity they have come to in later life? Were there significant others who had influenced their attitudes to learning - spouse - parent - close friend – either adversely or positively?

Direct questioning does not always produce full answers. Rather the information has to be gathered gradually from hints and nuances during the course of the interview. A conversational approach leads to more expansive responses, but problems then arise about how to keep the interview on track. The interviewees were encouraged to recount their educational life history and in most cases this progressed chronologically, although there were occasional flashbacks and

replays as incidents were remembered. In some cases there was reflection on incidents, which with hindsight, could be seen to be turning points. Together we tried to identify 'significant learning experiences', important influences in their attitudes to learning, historic or social events that impacted on their learning, feelings about retirement and their motivations to learn now. Similar themes were explored by Antikainen et al (1996) and suggested for further research by Withnall (2000). To maintain a sense of discipline and form to the interviews a schedule of broad topic areas was drawn up and served as the framework for the questioning and a useful prompt:

**Experience of school** - was this negative or positive? Age of completion of education and feelings about that time, reminiscence about school days to be encouraged, trying to detect any unvoiced feelings about learning.

**Social/ cultural factors** - attitude of family and peers to learning; were they part of a learning culture? Gender attitudes to learning. Was the move into work welcome; was there choice? Ambitions fulfilled or frustrated? Feelings about work and the work environment.

**Lifetime experiences** - were there opportunities for learning during adult/ working life? Note: many older women did not have a career; does this impact upon their attitude to learning? How does marriage impact upon learning opportunities? Was learning associated with career progression? Was learning a social leisure activity? What happened during WW 2? Family commitments.

**Retirement** - was retirement welcomed? How do they regard the learning they are doing now; do they have learning ambitions; how do they fill their retirement time?

**Social activism** - involvement activities in the community

These topic areas were described to the interviewees but they were in no way boundaries beyond which it was forbidden to explore. The aim was to create an unhurried atmosphere conducive to relaxed communication and to allow ample time for reflection. The style used was informal, more conversational than interview. A combination of closed and open-ended questions was used. Closed questions serve to impose some structure to the interview, whereas open-ended questions give the opportunity to explore attitudes and feelings towards a

situation: For example: How old were you when you left school? Followed up with: Tell me how you felt on your last day at school.

There are problems inherent in active/creative interviewing, necessitating the exercise of caution when asking older people to reflect upon their life. Life stories are subjective interpretations - open to change over time and in different contexts. They are social constructions, created and sustained by social interaction. Thus experiences are made real through the telling and presentation. The role of memory is to be questioned here: respondents may 'tidy-up' the facts for the sake of making a good story. Too much prompting may lead to invention of information in order to placate the interviewer. The part played by the researcher becomes a delicate one. All interviews are interactional, life histories being created in situ with the active participation of the researcher who thus becomes in part responsible for the creation of the data. Knowledge is created through the actions undertaken to obtain it. 'The interview conversation is thus framed as a potential source of bias, error, misunderstanding or misdirection' (Holstein and Gubrium 1997 p.113). Taking this assumption further, it can be argued that all conclusions are tainted either by the theoretical suppositions of the researcher or by the subjectivity of the respondents (Walker and Evers, 1986 p.385). When a researcher inquires into the social reality of an interviewee, it causes them to reflect on that reality and, as a result, they may change their view of that reality. Of course this could be construed as people simply trying to clarify their ideas.

Silverman (1993 p.91) claims that interviewers in the interactionist tradition are not simply creating narratives but are reconstructing social worlds. [See also Alheit 1992 and Merrill 2002] In the case of this study the researcher was also re-visiting social and cultural experiences held in common with the interviewees. Such interviewing can be regarded as a living relationship in which trust and confidence are established and in which the researcher can share some of his/her own story (West 2000). In asking questions the interviewer is also asking questions about him or her self and possibly being changed by the process.

My primary concern was to generate data that would give an authentic insight into the educational experiences of these particular people in the mid to late twentieth century. Inevitably the research process was informed by certain theoretical presuppositions (some of which proved to be wrong), and was influenced by my own cultural assumptions. A certain amount of subjectivity is unavoidable. The researcher's objectives and subsequent analysis are influenced by his or her values. Consequently a seemingly conversational approach can be slanted to produce the desired answers. The theoretical stance of the researcher radically determines the nature of the information being sought whilst interpretations of the text risk being subjective.

During the earlier interviews I was aware that I was tempted to lead the questioning in specific directions, trying to find evidence to suit my theses. For example, I believed it was important to find indications of poverty and deprivation in childhood, thinking these might be a springboard to involvement in learning. After only three interviews, I realised that my concept of poverty did not match that of the subjects. No-one thought of themselves as having been poor, they were simply the same as everyone in their locality. I was applying standards of the late twentieth century to the economic situation of the earlier part of that century. Indeed I had forgotten the hardships in my own childhood. In subsequent interviews I tried avoid pursuing particular themes but rather let them emerge. My perspectives on some issues began to be challenged. I had expected marriage and family life to act as barriers to participation, but found that for the majority of my interviewees they triggered involvement in a wide range of learning activities. It seems that new interests and the need to learn are generated by changed status. Successive interviews threw light upon earlier conversations and it was only in the accumulation of insights from the whole set of interviews that it was possible to begin to identify the significant themes.

Considering the ethics of interviewing, Fontana and Frey (1998) express concerns about the power relations between researcher and subjects. A typical interview produces a hierarchical relationship, with the respondent being in the subordinate position, perhaps feeling pressured to give the 'correct' response. What seems to be a conversation is really a one-way pseudo-conversation. This

poses the ethical dilemma of studying people for opportunistic reasons. Merrill and Crossan (2000) express fears that some interviewing could be described as exploitation of the subjects and suggest that there is a constant struggle to make the research process more equitable.

Is the relationship between interviewer and respondent more equal if the researcher is a member of the same cultural social grouping (Miller and Glassner 1997)? It can be argued that only a member of the group being investigated has the subjective knowledge to enable a real understanding of the life experiences of that group. The fact of my being an insider, known to the interviewees presented both advantages and difficulties. As an insider, I was able to look at the issues around participation from the standpoint of an older learner and feel comfortable in the interview situation.. A younger interviewer could be more objective but might risk appearing patronising. Having shared the educational experiences of the youngest cohort and having a similar life history I had an appreciation of the culture. This was to prove an advantage when interpreting the significance of life events in the process of data analysis. However, I found it more difficult to approach the life experiences of the oldest cohort who were only a decade removed from my parents. Previous acquaintance with the interviewer encouraged frankness from the respondents who, I hope, felt that we were speaking as equals. However the relationship was not really equal. Occasionally I suspected I was being offered a comment they thought I wanted to hear. I was controlling the shape of the interview, bringing to it my own agenda, guiding the 'conversation' in the direction I wanted it to go. Being close to the situation renders objectivity difficult. Researchers collect, analyse and present data in the light of their own life experiences. In this study the researcher is an older learner who also has an educational life history. Did I remain detached in gathering the data? Probably not. Attempts at objectivity tended to move the interview towards the inquisitorial and the conversational flow became stilted. When the rapport was at its best I was privileged to hear unexpected and occasionally moving revelations. For some the interview was an empowering experience, allowing them to confront past difficulties. Many revealed personal and intimate issues and I was made aware of the need for sensitivity in conducting the interviews.



West (2000) advises that relationship is at the heart of good biographic research and it is imperative that this is a relationship of trust.

The fact that the interviews are not genuine conversations, but rather stories created through the combined efforts of the researcher and the interviewees, raises the issue of the validity and reliability of the data. Working with tapes ensures an accurate record of the 'conversation', whilst the compilation of transcripts and field notes lead to the recognition of recurring themes. The responses of the interviewees were largely subjective and perhaps occasionally romanticised. The space of one hour gives little time for reflexion and it is likely that if follow-up interviews had been possible past experiences would have been viewed more objectively and memories checked for accuracy. It can however be argued that subjective responses present a more vivid picture of the social worlds being investigated than would be revealed by a strictly objective examination. The reliability of the data was confirmed as the number of interviews increased. Similar experiences and similar reactions were recounted, successive interviews mirroring the previous ones, validating what has gone before.

### **Approaching data analysis**

Interviews are traditionally analysed as more or less accurate descriptions of experiences. The analytic aim is to show how what is being said relates to the experiences and lives studied. A rich transcript is the resource for analysis that must be approached objectively. The researcher does not know at the outset what phenomena will emerge and as the analysis proceeds there is a necessity to constantly review and revise opinions. The tendency to ignore evidence that does not fit the thesis has to be avoided. I tried to be conscious of my personal stance during the interviews and later, when analysing and interpreting the data, endeavoured to be objective. I was anxious to respect the integrity of the life stories that had been created but was aware that, because a relationship had been formed during the interview process, it was difficult to remain detached. The participants and their stories were being seen through my eyes. A different researcher would perhaps have given a different interpretation.

There were many false starts during the process of analysis until I found a method that could begin to address the complexity of the data. The first task was transcription of the tapes. This was carried out as early as practicable after the interview had taken place. Whilst the interview is still fresh in the memory it is possible to make notes for clarification of what was said. It also aids a refining of the interview technique, noting which questions confuse the interviewee or which produce meaningful answers.

During transcription of the earlier interviews a start was made on identifying categories and themes that seemed relevant to the focus of the research. These were then explored more deeply in later interviews. The quest was for themes common to all cohorts and to attempt to understand the significance of those themes. Coding the data with coloured markers on the text proved to be confusing and rather than clarifying issues seemed to be fracturing the stories which were being told. Eventually I found it easier to listen to the tapes over and over, making notes as I listened, 'living and dreaming the interviews' (Gaskell, G. 2000 p.43). This immersion in the data allowed me to relive the interview and not lose sight of the person whose story was being created. There was a constant tension between coding and categorising the text and presenting the person's story. The compelling interest of individual biographies set in their social and historical context, can conflict with the search for significant themes. There is the danger that a real person and their experiences may serve as a mannequin on which to display particular concepts. Ultimately the person is more important than the concepts.

Organising the themes and categories was aided by constructing a matrix, as advocated by George Gaskell (2000 p.54). Research themes and objectives were set out as questions to head the columns. What each respondent said was entered in the rows under the appropriate column. If a new theme occurred a new column was added. This gave some semblance of structure to the data, bringing responses together in an accessible way. A final column was available for notes.

Some of the themes to emerge were expected and were to some extent built into the questioning. Antikainen et al (1996) had already signposted the importance of significant others and significant learning events and this was confirmed by the data. Unexpected themes were the narrowness of expectations, especially in the oldest cohort, the restraining influence of parents stifling ambition, and the impact of marriage partners on learning habits. The impact of external events such as the economic depression, war or technological change were only recognised with hindsight by the interviewees and not fully understood at the time they were experienced.

Finding a coherent organising framework to encapsulate and explain the experiences and lives of the people being studied was difficult. It was only when the writing up process began that a structure began to develop. Having selected the interviewees on the basis of age cohorts a generational chronology was already in place. Common to all cohorts is the chronology of life stages :

- Childhood and formal education
- Transition to work and early adulthood
- Marriage and parenthood
- Retirement and adjusting to later life

The themes could then be examined within the framework of the life stages and also compared across the cohorts. For example, for all cohorts the data shows that at school leaving age, the prevailing local culture and opportunity structures of the period shaped job and life expectations. These expectations, especially for women can be demonstrated to have changed from the oldest to the youngest cohort. Differences between the cohorts were also noted in expectations at retirement, the younger interviewees being more aware of the opportunities presented by retirement. WW2 impacted differently on each cohort, but this was associated with the age at which they experienced the war.

A life history/ biographical approach produces very rich data but its complexity presents difficulties. The task is to disentangle the complicated interplay of influences and events that have shaped each life. At the same time we must

assess the role of personal disposition in leading these people to become lifelong learners. There are core issues such as war or economic restraints common to everyone, but these have to be set alongside family situations and the input of other people. There are gender differences and class differences. There are situational constraints: being in the right place at the right time or the wrong place at the wrong time. Finally the challenge is to portray these many strands whilst respecting the integrity of each life story.

## 4. PRESENTATION OF DATA

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Data from the questionnaire

Data from the interviews

Summary and discussion

### DATA FROM THE QUESTIONNAIRE

This first section is a report on data taken from 120 questionnaires. The aim was to build a statistical image of the membership and activities of this particular group. The data is presented under the following headings:

- Age and gender distribution
- Length of initial education
- Occupation before retirement
- Involvement in the U3A and other learning activities
- Perceptions of the U3A
- Social activism

**The age distribution** of the sample ranged from 60 for the youngest member to 89 for the oldest.

Average age		73.5 years
Respondents 80 or over	*****	15%
Respondents 70 – 79	*****	43.5%
Respondents 60 – 69	*****	41.5%

**The gender balance** was 2:1 in favour of females, except in the over 80 group where equal numbers of men and women presented. This last figure is surprising as demographically women outnumber men substantially in the oldest age group. However, with a membership of over 1200, this particular U3A group is large and the proportion of male members is higher than the national figure of 3:1.



education may have been disrupted. Social, cultural and historical factors leading to these changes will be examined in analysis of the life histories.

**Table 2: Length of initial education Cohort 1  
Born pre 1920**

Left school at 14	*****	33.5%
Left school at 16	*****	25%
Left school at 18	*****	33.5%
Further or higher education	****	8%

**Table 3: Length of initial education Cohort 2  
Born 1920 –29**

Left school at 14	*****	20%
Left school at 16	*****	33.5%
Left school at 18	*****	20%
Further or higher education	*****	26.5%

**Table 4: Length of initial education Cohort 3  
Born 1930-39**

Left school at 14	*****	12%
Left school at 15	*****	12%
Left school at 16	*****	22%
Left school at 18	*****	22%
Further or higher education	*****	32%

To emphasise that members of the U3A are untypical of the general population, it should be noted that across the cohorts the percentage continuing in education beyond the statutory leaving age never falls below 66%. This appears to reinforce the thesis that those most likely to participate in adult learning are the already better educated.

These raw figures give no indication of the social and economic factors leading to changes in participation habits during the twentieth century. The Education Act of 1944 introduced secondary education for all, but the school leaving age was not raised to 15 until 1948 and to 16 in 1972. Of the respondents to this questionnaire only those born post 1933 were obliged to stay in school until the age of 15. The social composition of grammar school populations changed from 1945 with the arrival of more working class children. Previously a limited number had entered grammar schools on scholarships. It seems likely that widening access to academic secondary education led to an increase in the uptake of further and higher education. However we shall see when we examine the data from the interviews that the reasons are much more complex than simply availability of access. Social, economic and cultural factors all impact on the decisions to continue in education or not.

### Occupation before retirement

The responses relating to the employment background of members, taken together with higher than average take-up of further or higher education, especially in the younger cohorts, confirm the perception of the U3A as a predominantly middle class organisation. [Table 5]

**Table 5** Occupation before retirement (all cohorts)

Professional or managerial	*****	40%
Clerical occupations/nursing	*****	36%
Skilled or semi-skilled	*****	18%
Self-employed	**	3.5%
No employment	*	2.5%

The no employment figure refers to women who described themselves as fulltime housewives. All other women respondents appear to have worked for



substantial periods. This runs counter to a widely held perception that married women of the current older generation did not work after marriage.

**Levels of participation [Table 6]**

Twenty-one different subjects were named as being studied by the respondents. The ones cited most were languages, literature, music appreciation, opera appreciation, and history of art, current affairs and psychology. To some extent this reflects what is available. Languages and literature feature very strongly, as there are many groups covering these areas. This is also the case with music and opera appreciation. Science and psychology have only one group each, both of which are oversubscribed.

In terms of individual participation, one energetic member attended 9 study groups, but others were more modest in their involvement. The figures in Table 6 suggest that for most members, studying with the U3A does not account for a large part of their weekly routine: two thirds of them attend three groups or less. In some cases the attendance was spread over two weeks as the group meets only fortnightly. From responses to later questions it is apparent that these people engage in a wide variety of activities in other fields. Learning is just one activity amongst many others.

**Table 6 Participation in study groups**

6 study groups or more	***	5%
5 study groups	*****	12.5%
4 “ “	*****	15%
3 “ “	*****	20%
2 “ “	*****	20%
1 “ “	*****	25%
No reply	**	2.5%

There were no significant differences in the extent of involvement between the age cohorts or between the sexes. The amount of time devoted to learning

activities is probably determined by personal disposition and by other commitments.

Respondents were also asked about their learning in **organisations other than U3A:**

32.5% were currently involved in other learning organisations. These ranged through local authority courses, Workers Education Association, Folk Dance Society, Photographic club and Arts Centre classes.

37.5% had been involved in such activities in the past. Reasons cited for no longer doing so included increased family commitments; course came to end, some times due to insufficient numbers; fees became too expensive; new interests; inconvenient timing; preference for the U3A ethos.

These figures would seem to indicate that U3A participants are mostly people who either now or in the past have considered learning as one of their normal activities. However we should not forget the 30% who do not appear to have participated in any kind of learning since leaving school. It seems unlikely that they are completely new to learning activities. It is possible that they are discounting leisure pursuits, learning at home or training episodes in connection with work. This was borne out during the in-depth interviews, when, after prompting, previous learning activities were recalled.

### **Perceptions of the U3A**

There are many debates amongst the membership as to the function of the U3A. Is it principally an educational organisation? Or is its purpose a social one? Is it possible to successfully combine the two aspects?

Only 25% of the respondents considered the U3A to be solely an educational group. They were predominately male and were mostly participating in a larger range of subjects. Half of this group also attended classes in other organisations and had also done so in the past. It would seem that this group constitutes committed learners, perhaps fitting the description of sages, people for whom life

is still an intellectual adventure and who now in later life can make choices about what and how they want to learn (Jarvis 2001). Some respondents in this group hinted that they would like more intellectual rigour in the courses.

Reasons stated by this group for joining the U3A reflect this commitment to learning:

- Mental stimulation
- Continue learning
- Study new subject
- Pursue a particular (named) subject
- Increase knowledge

All the above could be regarded as educational rather than social motivations.

The other 75% of respondents considered the U3A to be a group combining social and educational activities. No one opted for the simple social group definition. Motivations to join fell into the following categories:

- To widen horizons in a social setting
- Meet new, like-minded people
- To keep mind active
- Coping with a life style change (retirement, relocation, bereavement)
- Join friends who were already members
- Recreation
- To keep in touch with people when living alone
- To develop new interests

Although some of this larger group did mention educational aims, their reasons for joining were predominantly social. Chène (1994), writing about community-based learning, noted similar motivations and focussed on the importance of being with others. She suggests that the subject being studied is of secondary importance to social contact.

## **Social activism**

Benn (1997) found that participants in learning were likely to be involved in a wide range of activities in the community. This is confirmed by the 80% of the respondents to the questionnaire who indicated that they were active in other organisations as diverse as: Neighbourhood Watch, National Trust, church activities, Meals on Wheels, golf, hospital visiting, school governor, bereavement counselling and many more. Given this strong commitment to social activism, it is not surprising that 85% of the respondents had heard about the U3A from friends and acquaintances and only 15% through advertisements in newspapers or libraries, or through pre-retirement talks. Benn (1997) suggested that belonging to local organisations provides the social networks for information-seeking and being made aware of educational opportunities available in the locality.

## **Summary drawn from questionnaire data**

The picture that emerges from this data is of a group of people actively engaged in learning and also in a wide range of activities in the community. More than half of the membership is over 70 years old and 15% is over 80. These percentages correlate closely with those for membership nationally (Third Age News 2001). On the question of age and the link with participation it would appear that age, even advanced age, is no barrier to participation in learning. However it should be stressed that these members are not typical of older people in the general population. Over the whole age range only a quarter of them had left school at the statutory leaving age, whereas Gaskell (2000) suggests that, taking the population as a whole, the figure for that age group was probably more in the region of 70%. Even in the oldest cohort, that is to say the over eighties, only one third had left school at 14. A further third had continued in education to the age of 18 and 8% had proceeded to higher education.

Two-thirds of the membership is female, and this is reflected in the high proportion across all the age cohorts that had held clerical occupations or had worked in nursing or teaching. It is only amongst the younger women that we begin to see more diversity in women's employment, especially amongst those who proceeded to higher education. Only three women stated housewife as their

occupation, thus giving a high percentage of women who had been in employment. It should be remembered that some of the oldest married women would have been recruited into the workforce during the war years and might have been reluctant to return to the domestic scene full-time.

Early school leaving amongst the older men in the group did not seem to be a barrier to achieving professional and managerial status. There were several schoolmasters amongst the early school-leavers, and also some who had run their own companies. It would seem that for the oldest cohort employment status is not directly linked to educational attainment. Perhaps as a consequence of post-war training schemes for ex-servicemen, some of these older men were able to move into higher status employment. With the younger cohorts there is a much closer match between levels of educational attainment and employment status, although we can also find some early school leavers progressing to high status jobs.

Most of the membership is involved in only a few study groups and learning with the U3A appears to be but one activity amongst many others. A third of members are engaged in learning outside the U3A whilst a further third had done so in the past. Around 80% of the members could be termed social activists, being involved in a wide range of organisations in the community. Three-quarters of the respondents regarded the U3A as an organisation where learning activities could be pursued in a social setting with only a quarter describing its main purpose as educational.

The U3A experience is not capable of being generalised to all older learners. Its members have chosen a particular path to learning in an organisation that has its own distinctive ethos within which not all older people would be comfortable. There are doubtless older learners who have chosen a different path to learning having enrolled in formal learning organisations or whose learning is incidental to their work as volunteers. The members of this group are predominantly middle class, although many would claim working class roots. It should be noted that the second half of the twentieth century was a period of social mobility. Enthusiasm for learning in a social context is apparent. In terms of the typologies of retired

people put forward by Jarvis (2001), many of these people are 'doers'. They seek to remain active both mentally and physically. They enjoy travel and study holidays and engage in voluntary work in the community. Some will qualify for the Jarvis title of the 'sages'. For them, life is still an intellectual adventure and now, in retirement, they can choose which interests to pursue. A few may aim for qualifications, others seek learning for learning's sake and others are using learning as an entrée to social contact. Learning in community-based groups such as the U3A provides the opportunity to create new friendships, generate mutual aid, share experiences and to enjoy a sense of belonging. These last aspects of participation in activities of the U3A received frequent mention in the life histories that follow.

The data generated by the questionnaire began to address some of the issues raised in the research questions. It demonstrated that for this group of people neither old age nor limited initial education are barriers to participation in learning. There is an indication that for many of these older learners their motivations to participate are not primarily educational but are linked to factors such as adapting to a new life stage, maintaining social contacts and developing new interests. Most of the respondents had participated in learning at various times during their life span but mostly as a leisure pursuit and not on a regular basis. In retirement, learning is but one activity amongst many others. This data does not reveal the meanings given to learning by these people nor the routes that brought them to learn in an informal/non-formal setting. The life histories that follow move us towards an exploration of the ways in which learning was experienced across the life course. We shall see how constraints of finance, class, gender and location, combine with personal disposition and a multiplicity of factors to shape attitudes to learning and to influence the choices which people make at different stages in their lives.

## **DATA FROM THE INTERVIEWS**

The data from the interviews is presented in two sections:

- The life stories/ biographies of the interviewees are introduced by cohort. These track individual learning experiences through successive life stages.

Child hood and early education

Transition to work and early adulthood

Marriage and parenthood

Retirement

Life stages can be regarded as significant markers in the life span. Changes and transitions are likely to trigger new learning experiences.

- Comparisons across all cohorts will be made, identifying differences and similarities of experience. Themes which emerge from the data will be presented and used to demonstrate how, in each generation, life-course shaping decisions were made in response to social, cultural economic and historical events but also how choices were made on the basis of personal disposition and circumstances

The interviewees are listed on the following page. Names have been changed.

**The interviewees:** Biographical details are to be found in appendix ii

<b>Cohort 1</b>			
Emmy	Born 1915	Left school at 15	no qualifications
Joan	Born 1916	Left school at 14	no qualifications
Bill	Born 1916	Left school at 18	Failed Higher School Cert.
<b>Cohort 2</b>			
Henry	Born 1923	Left school at 14	no qualifications
Sidney	Born 1923	Left school at 16	Commercial course
Rosemary	Born 1924	Left school at 14	no qualifications
<b>Cohort 3</b>			
Joyce	Born 1930	Left school at 14	no qualifications
Ruth	Born 1930	Left school at 14	no qualifications
Sheila	Born 1931	Left school at 16	matriculation + librarianship
<b>Cohort 4</b>			
Rita	Born 1935	Left school at 15	no qualifications
Irene	Born 1933	Left school at 15	HND
Mary	Born 1934	Left school at 18	University degree



## **COHORT 1 – AT SCHOOL IN THE 1920'S**

### **Child hood and early education**

The three oldest interviewees were all at school during the 1920's. Emmy was in Germany, the other two, Joan and Bill, in London suburbs. All have similar memories of strict but concerned teachers who were able to impart their knowledge in an inspiring manner, in spite of very large classes of forty to fifty pupils. Their accounts suggest a strangely tranquil way of life given the economic and social difficulties of the period. They display a kind of certainty that their lives would progress along well-defined lines. None of the families was affluent and there was an uncritical acceptance that educational opportunities were limited through lack of money.

**Bill:** born 1916, performed very well in primary school and was promoted rapidly through the classes, reaching the top class at eleven, a young pupil amongst the fourteen year-olds. He passed the entrance exam to grammar school but was not awarded a scholarship and his parents could not afford the fees. *“Dad was an hourly paid craftsman – a carpenter - he could lose his job at any moment - he decided he couldn't take the risk”*. Consequently Bill was transferred to a Central school which provided a limited form of secondary education. He did well there: *“I was always in the top two or three in the class. The teachers were very encouraging. The English master suggested I should become a teacher and the school managed to arrange a transfer to the grammar school sixth form”*.

However two years later he did not achieve the grades to be accepted for teacher training. He failed chemistry and geography. He felt that because he had missed out on the early years of grammar school he lacked the grounding in these subjects. Almost seventy years later, the pain of failure was still apparent. He clearly remembered the questions he answered badly and felt he could have achieved more.

*“ I passed in Physics and in Maths, but Chemistry-no. I probably used the wrong indicator in the practical. In Geography- there was a question about the Isle of Wight- I misread it - by the time I realised – it was too late. Years later I thought I might try and do chemistry again – but I never did. The headmaster helped me find a job as lab assistant at Regent’s Street Poly in the school of photography. That suited me very well. Photography had been my hobby since the age of eleven. I had taught myself developing and printing in the kitchen with my dad. In the end it turned out very well and I had a good career in photography as it developed into a mass market.”*

Here we have an opportunity being denied because of financial limitations. There was perhaps also a question of location. Bill told of there being an increased demand for grammar school places in his home area and a limited number of scholarships in the year that he applied. If he had lived elsewhere perhaps the selection lottery would have worked in his favour. Noteworthy is the encouragement and support he received from teachers. It was his English teacher who raised his aspirations and his headmaster who was instrumental in finding him a job.

For the two women in this cohort, school does not seem to have been a very high priority: both gave the impression that school was only a staging post until the time came to start work and later to marry. This may have reflected the attitude of their parents towards education for girls. The parents of Joan (born 1916) saw no harm in disrupting their daughter’s education, sending her to stay with relatives to ease family pressures, although later they were prepared to fund a training course to ensure a reasonable level of employment.

*“I started school at nearly six, in the local primary school. I had been there about a year when my mother had twins. We were living in an upstairs flat and my parents told me that as I had a persistent cough they were sending me to live in the country with an aunt and uncle in Lincolnshire. That probably wasn’t the real reason. I was there for a year. It was a mile walk to school and we lived in a cottage with an outside toilet*

*and no electricity. The work was very different, much more arithmetic, and I wasn't very happy there, so after a year I went back to my parents and back to the same school. I failed the scholarship exam so I stayed there until I was 14. After that my parents managed to find enough money for me to follow a short commercial course."*

Interviewer: How did you feel about school?

*"I enjoyed it but I liked the commercial course better. It felt more important and I could see it was leading somewhere. I was very proud when I started work."*

Likewise Emmy (born 1915) considered that starting work was more important than schooling. Her primary education was completed in Germany before 1930. When asked about school she replied:

*"It was so long ago. It was another world. I had to start all over again when I came to England when I was 23. I suppose it was all right – I have no bad memories – but I learned more when I began work as a nursing auxiliary. School had given me the basics, but you only begin to learn properly when you are faced with life. You are learning to survive."*

None of this cohort made reference to events outside their own immediate environment. Perhaps as children they were shielded from external happenings: the collapse of the economy in Germany, social and economic unrest in Britain leading to the General Strike, the Wall Street Crash triggering a world wide depression. Yet the impact of these events is perhaps reflected in the pragmatism with which all three accepted the move from school directly in to work. Such was the normal progression for the majority of young people and no one thought to question it. Bill's aspirations had been raised and then dashed, but he was pleased to find congenial employment. All three expressed a belief that school had provided the basic tools but that real learning began when they moved into employment. Nowhere is there evidence of idealisation of education that Antikainen(1998) claims to find in older people. All three members of this cohort were in employment by early 1930's.

## Transition to work and early adulthood during the 1930's

All in this oldest cohort claimed to have done no formal work-related training, or what they would term 'education' in the post-school period. They all spoke of learning that came from experience and from colleagues or employers. The two women were happy to follow their parents' plans for them. **Joan** was very pleased to find a job doing clerical work. She was the oldest child in the family and there were still three younger children to support. Her parents had paid for a commercial course, seeing employment in an office as a step up from factory work. It would be a useful occupation until she married. It did not occur to her to question these parental expectations:

*“ My first job was within walking distance of home. I was paid £1 per week. My mother allowed me to keep 5 shillings. That was quite generous in those days. I did change jobs several times, always for more money but also to widen my experience. I never did any evening classes – I didn't see the need. I could always ask some one at work if I was stuck with something. I was enjoying my job and I had a pleasant social life, dancing and walking. I also played tennis, [she played at county level, which presumably meant some training]. I was involved with the church. At home I did knitting and dressmaking. I suppose I learned those from my mother. Once I did a first aid course. I don't know why. Perhaps I went to keep a friend company. Eventually I met Bill. Once I was married and we had the children there wasn't much time for learning.”*

Joan had assumed that she was being asked about formal learning, leading to a qualification. Other activities were considered as leisure pursuits even though they involved the acquisition of skills. She made most of her own clothes and the church activities involved organising a Cub Scout group. She had expected the period between school and marriage to be quite short but the war intervened and she spent 14 years in clerical work until the arrival of her first child. For the rest of her life she was housewife, mother and carer.

Emmy also devoted most of her life to caring for her husband and two children and later her parents. Her work in nursing was intended to fill the time until she married. She had always expected her life to be in the domestic sphere.

*“I enjoyed my work in nursing but I was very happy when the time came to look after my family. It was what I had grown up to expect. My parents lived with us. After all the turmoil we were very happy together.”*

The turmoil to which she refers so lightly obliged her to completely re-think her life, learn a new language and new skills for living. Arriving in the UK as a refugee at the age of 23, she had no access to formal training but was fortunate to find herself with a sympathetic employer who helped her to adjust to a new environment.

*“I was only allowed to do domestic work but I worked for a wonderful lady. She spoke to me all day long and insisted on correcting my English. She took me to the cinema and to concerts and really educated me in the English way of life. By the time my parents joined me I was able to explain everything to them.”*

Emmy dismissed this profound learning experience. It had not taken place in a formal setting and she described it as simply learning to survive. Antikainen (1998) describes similar stories of survival where people learn new skills in order to cope with day-to-day life.

Bill also claimed to have done no learning during this post-school period. He settled into his job as lab assistant and was allowed to sit in on lectures at the polytechnic where he was employed. He felt this did not count as education as he was not officially enrolled as a student. The tendency to discount any learning that was not leading to recognised qualifications was common to all the interviewees across all the cohorts. Later when Bill moved to Kodak he went on numerous training courses but he regarded those as part of work: *“It was in Kodak’s interests to make sure we were up to date with the newest developments.”*

Called to the army in 1939, Bill was sufficiently up-to-date in x-ray photography to be selected for training as a radiographer.

*“ We were supposed to be sent on a training course, but it was really a joke. There were continual interruptions for jobs like filling sandbags. During the war the army wasn't very keen on education. In the end we learned from the people already doing the job. ”*

Bill had disregarded all these learning episodes. None had led to a recognised qualification therefore he felt they were not significant.

#### **Marriage and parenthood    1945 onwards**

The members of this oldest cohort were already adult at the outbreak of World War 2 and all married towards the end of the war. The women had little to say about wartime experiences, claiming that they simply carried on with life and work as normally as possible. For **Bill** it was a first time move away from home but all his war service was in England and in the later stages he was posted very near to home. He was able to turn his war service to advantage in civilian life. His radiography expertise led to re-employment with Kodak working on the development of x-ray equipment for the National Health Service, an area in which he worked for more than forty years.

After the war the two women in this cohort were happy to adopt the role of fulltime housewife, devoting themselves to husband and family. It could be argued that marriage and childcare is the biggest learning project of all, but for **Joan** it was simply getting on with life. She told how she had made clothes and curtains and had run craft clubs for cubs and scouts, situations where she was both learning and teaching. In addition there was the allotment where she and **Bill** grew fruit and vegetables and the jam making and bottling. There had also been attendance at cookery classes and cake decorating. When asked how they acquired their gardening skills, Joan replied:

*“I don’t know. Perhaps we took books out of the library. Or we talked to the other people at the allotments. Oh, yes we did join a gardening club. Most things we just found out about when we needed to.”*

Learning skills as and when required was a feature of Joan and Bill’s life together. Some years into their marriage, when their children were going on exchange visits to France they took up French classes and both passed O level. Joan then went on to learn Italian and Bill did a German course. Their skills in French developed rapidly when they bought a property in France and negotiated with local workmen to do repairs and renovations.

Initially they did not think these language skills worth mentioning and yet this illustrates how skills are acquired to cope with changing life circumstances. Jarvis (2001) describes how much learning arises from a disjuncture between biography and experience. We find ourselves in a new unfamiliar situation and we respond to it by seeking out the necessary information. When confronted for the first time with the responsibility of an allotment, Joan and Bill had joined a gardening club. Pioneering foreign travel in the 1950’s, Bill and Joan took their young family camping in Europe, again a situation which led to significant learning experiences.

*“ We were very naïve. We didn’t even know how to put up the tent. We just bought a map with campsites marked and set off. Over the years we have broken down in almost every country in Europe. Our technical vocabulary is now very extensive.”*

Joan and Bill made a point of emphasising how many of their activities were shared enterprises and how they enjoyed finding new interests together. In the post war years when access to adult education became easier, they attended classes in a wide range of subjects and this habit continued into retirement. They stressed that this learning was not serious, even when disciplined study was required. It could be described as part of the British habit of ‘topping-up’ existing knowledge (Bell 1996).

Emmy claimed she had little time for learning being too busy with home and family. Yet she had attended local authority classes in music appreciation and literature and had skills in sewing and embroidery developed in adult education courses.

*“I was lucky. My parents lived with us, so there was no problem about going to classes if I wanted to. I never did anything seriously, just for pleasure. And then I always enjoyed the school holidays when I could take the children to museums and galleries.”*

Emmy probably matches the image of the middle class woman often depicted as the typical participant in the non-vocational liberal adult education of the sixties. She also enjoyed learning activities with her children, an experience we shall see with other women in later cohorts. All three members of this cohort were able to take advantage of easier access to adult education, non-vocational classes during the 1960's and 1970's. They did not regard their lack of academic qualifications a barrier to participation and such leisure activity seems to have been a normal part of their life.

### **Retirement** in the 1980's

These people reached retirement age in the early 1980's and so have been retired for more than twenty years. However as fulltime housewives, Joan and Emmy deny that they have retired. They still have their domestic routine and could be said to subscribe to the continuity theory of retirement (Gee and Baillie 1999) wherein the basic pattern of life continues with perhaps more time being devoted to joint leisure activities.

Adjusting to bereavement was considered to be more difficult than moving in to retirement, especially where there had been a high degree of dependence on the partner. Emmy explained how after the initial period of grieving she had to re-shape her life and to adjust to living alone:

*“We had a very full life together – we had been a big united family – parents, grandparents and children. Life at home was always busy and*



*interesting. First the children left home. Next my parents died and then my husband. That was ten years ago. I had never lived alone before. I became very depressed. Fortunately I had good friends and neighbours who took me in hand. Then the doctor suggested I should try U3A – it has changed my life. I have picked up interests from my past like music and languages and I have made many friends. I was one of the early members.. Now I have learned to use a computer – my husband would not have believed I could do it. I always relied on him. ”*

For all the men in this study, retirement from work was a difficult transition. Bill had felt that he was ready for retirement. He had become tired of office politics and constant innovation. He had even been on a retirement course and thought he knew what to expect:

*“At first I was quite disorientated. I didn’t know how to plan my day. It was very tempting to drift through the day and then have nothing to show at the end of it. I had always regarded the home as Joan’s domain and I did not know how to fit in. Fortunately she soon organised me to help around the house and garden. Then we enrolled for classes, first with the local authority and then later with U3A. The classes became more and more expensive and U3A was much cheaper. We were amongst the early members. These classes are not as demanding as the previous ones, but very enjoyable. Then we did a course in bereavement counselling and we are also very involved with church activities. Retirement has been very good for us. There is always something interesting to do, to find out about. Our children are keen for us to be on the Internet. We shall probably get there eventually.”*

An early response to retirement for Bill and Joan had been to enrol in classes. This was in the early eighties when access to adult education was still relatively easy. When asked why they had chosen adult education classes they declared that it was to remain mentally active and also to develop new interests such as history and literature. Their motivation appears to be primarily educational and when they later moved to the U3A they expressed doubts about the intellectual

quality of some classes. Joan has moved a long way from the 14-year-old who could see no point in attending evening classes. For Emmy it is the possibility of social contact after bereavement that has drawn her towards learning in later life although the learning habit had been well established earlier.

## **COHORT 2 AT SCHOOL IN THE 1920'S AND 1930'S**

### **Childhood and formal education.**

The world beyond home is reflected more vividly in the accounts of the second cohort, born in the 1920's and growing up in the thirties. All the interviewees referred to poverty either in their own family or their immediate surroundings and indicated that economic considerations were paramount when decisions were made as school life came to an end. Attitudes to primary education ranged from extreme enthusiasm through enjoyment to mere acceptance of the situation.

*Sidney (born 1923): "Every thing about school I loved – I used to take books out of the library about schools – stories about public schools – nothing like my school in West Ham. There were 45 children in the class. We had a wonderful teacher for history – I can remember the first lesson – The teacher started: "More than 2000 years ago in Rome" – I was hooked. I have been fascinated by history ever since. We lived across the road from the library. I read at least one book a week, either history or school stories."*

Interviewer: Did you know of anyone who went to grammar school or university?

*" No one in my neighbourhood ever went to grammar school or to university. They wouldn't have known what they were. I did the scholarship exam, my sister took me to the place for the exam, but I didn't really know what it was for. I don't know of anyone who went to grammar school. You went to school until 14, and then you went out and got a job. They were terrible times. We knew families who could not afford proper shoes and clothing for their children, but you just accepted that was the way things were."*

We see here tremendous enthusiasm for learning, but also an awareness of the poverty around him and the realisation that very few in his neighbourhood were given the opportunity to move up the social ladder. Sidney was the youngest of six children of an immigrant family. All his brothers and sisters had gone straight to work at 14. Perhaps because he was the youngest there was less pressure for him to be in work. When primary education came to an end he was allowed to take up a free place on a commercial course. *“Mr. Rose, one of my teachers said I should try for commercial college. I was really pleased to go there. It meant I could go on studying and I could learn Spanish”*. The pride of his parents can be sensed: *“ My father used to show my school reports around his friends.”* Perhaps it was hoped that continuing in education would improve his prospects of finding a steady respectable job, better paid than his siblings. There were, however, adverse reactions from friends and family:

*“ When I got the place at commercial college Auntie Jessie said: “why are you letting him go to college - he should be out working - bringing in some money.”*

It was something of an act of faith on the part of his parents taking a decision which ran counter to the mores of their neighbourhood, where young people were expected to go straight to work to contribute to the family income.

Again we see the importance of the encouragement of teachers pointing promising students in the direction of wider opportunities. Sometimes it was possible to follow their advice, but more usually, especially in the case of girls their ambitions were kept in check by cautious parents. **Rosemary** (born 1924) was such a case, following her parents' wishes rather than pursuing her dreams:

*“I enjoyed school apart from the Maths. I still have a fear of figures – and yet I ended up working in a bank! It was a good school and most of the teachers were kind - but quite strict. We spent a lot of time being drilled in spelling and tables and I enjoyed writing stories. There was a music teacher who encouraged me to sing – he made me feel confident about the*

*things I could do. I was in all the school concerts from the age of five. I would have loved to become a professional singer, but I knew that wasn't possible. My parents wanted me to go to work. So that is what I did when I reached 14."*

Rosemary's love of music was fostered and encouraged by her teachers and stayed with her throughout her life. However she accepted the norms of the time and milieu in which she lived and was content to go on to work. The narrowness of aspirations and expectations of both school leavers and their parents are significant traits in the generations growing up in the first half of the last century. This was mainly as a consequence of economic stringency. Most families were in need of additional income and jobs being scarce, school leavers were pushed into whatever was available. There was also the question of conforming to social norms of one's milieu and of responding to peer pressure.

Poverty is frequently cited as a deterrent to learning. Where financial problems dominate daily life, participation in learning is often given a low priority. **Henry** (born 1923) was the only one in the entire sample who felt he had not benefited from his primary education.

*"I really didn't get much out of school, but that was my fault not the school's. I was good at Maths, but I was more interested in what was going on outside. I often played truant and worked on the market with my uncle. I needed money for my mother. My dad was around but he was a gambler and we were always short of money. As soon as I was old enough, I left school and worked on the market."*

Given his home background it is unsurprising that Henry lacked commitment to school and was anxious to support his mother. All three members of this cohort were conscious of the economic constraints of the 1930's and were aware of the importance of their earnings for the family budget. Sidney's teachers were able to persuade his parents to allow him to continue in education, perhaps describing the benefits that would accrue from further study. Rosemary conformed to her parents' wishes and settled in a steady job. For Henry earning money was an

urgent obligation. All three were in regular employment well before the outbreak of war.

### **Transition to work and early adulthood      1937 onwards**

The subjects in cohort 2 left formal education between 1937 and 1939. For Henry employment was his immediate destination as was the norm for people of his social class. Indeed he had already worked during his truancy episodes and felt he was well able to survive in the world of the street market. He recalled:

*“School was OK but people like me didn’t go in for education. My mother needed the money. So I got a job. All my pals were getting jobs too. The market was all I ever knew and my uncle was there to keep an eye on me. I learned things as I went along. Eventually, after the war, I had four stalls a week in markets all over the south-east”.*

Henry had to become street wise very early in order to cope with poverty and to make a living in the markets. He insisted that he was never involved in learning and yet somehow he acquired the necessary skills to run a successful business that eventually brought him a degree of prosperity.

The other two members of this cohort undertook some post-school learning with a view to improving existing skills or adding new ones that might enhance prospects for promotion. Rosemary was content to be a typist as her parents wished and it was the type of work engaged in by her peers. She was tempted to step outside the cultural norms but common sense prevailed.

*“There was no way my parents could have afforded music lessons or to have put me through college. So I learned shorthand and typing – was a typist all my life - more than fifty years. I loved typing. My aunt was a typist- I suppose she was my role model. Singing became my hobby and my obsession. I did some evening classes in French and Spanish, so that I could do foreign correspondence.”*

On completion of his commercial course, **Sidney** started work in an import/export business. He continued studying in evening classes but most learning was work based. He described how new comers were put through informal training under the surveillance of an older worker:

*“We were moved around every few months so that we got to know all aspects of the work and then we were placed where we would fit in best. You wouldn’t call it training but the older people gave you lots of tips and advice. I was eventually put to work in the foreign correspondence department.”*

All three members of this cohort referred to the influence of other people, the ‘significant others’ who directed their learning habits. Henry picked up tips from his uncle on how to run a stall; Rosemary had a role model in her aunt; an older worker in the office monitored Sidney.

In 1941, having reached the age of 18, Henry and Sidney were drafted into the army. They were reluctant to speak about their wartime experiences, but both felt they had been exposed to events for which they were emotionally unprepared. They had never been away from home before and were obliged to grow up very rapidly.

*“Nowadays they would offer you counselling for what we went through, but at the end - we were just sent home and expected to return to normality. We went back to the jobs we had been in before the war as if nothing had happened.”* (Sidney)

Yet out of the upheaval, learning opportunities did arise. **Sidney** ended the war in Italy and whilst awaiting demobilisation spent six months learning Italian. This seems to have reinforced his love of languages. Spanish was already in place and later he added French to his repertoire, skills he was able to use when in later years he set up his own import and export business. None of these language skills were certificated. With hindsight **Henry** regretted that his war service had not led to anything positive and that he had not taken advantage of

the training opportunities offered to ex-servicemen at the end of the war. At the time he was anxious to return to the familiarity of the environment in which he had grown up.

*“I wanted to get back to what I knew and be one of the lads. My mother needed support. In my part of the East End everybody grafted –you didn’t get ideas above your station. I can see now I could have made more of myself. I think I could have been an accountant – but in those days I never had time to think. We should have been given advice – but I probably wouldn’t have taken it.”*

### **Marriage and Parenthood    1950’s onwards**

Courtship and marriage in the post war years brought opportunities to develop new, shared interests. This was a time of economic expansion and relatively easy access to leisure activities. Rosemary had already learnt craft skills and cookery in evening classes and was studying music when she met her future husband:

*“I met my husband through music classes. He introduced me to Gilbert and Sullivan and together we saw all the shows many times over. I love any kind of music, popular or classical. We often went to the theatre and art galleries. The galleries were free and the theatres very cheap.”*

The influence of partners in developing new interests and extending horizons is also apparent in Sidney’s story. He had undertaken study associated with work but his leisure activities had been rather narrow:

*“Until I met my wife I just played table tennis or went around with friends. I had never been inside an art gallery or to a concert or the theatre. She introduced me to all those things – they have really enriched my life. We even started a music society amongst our friends. I went to evening classes in music appreciation. I would never have done any of that without my wife. We are both interested in history, so when we became more prosperous and could afford a car, we were able to travel around visiting historical sites and researching particular people.”*

It is apparent that the fifties and sixties were a period of expansion both economically and culturally. Learning opportunities were there for those who were motivated to take advantage of them. We saw that members of the oldest cohort were also enrolling for classes during that period and we shall see some members of the younger cohorts following a similar behaviour pattern.

Of the entire sample only **Henry** never engaged in organised learning, either in connection with work or for leisure. He also regretted that he never had time to spend with his children. His lack of involvement with his children seems to be common to all the men in the sample. Perhaps they were judging themselves too harshly but all three claimed not to have had time to interact with their children because of work commitments or because they were too tired when they came home in the evening.

#### **Retirement**      during 1990's

Apart from a few years when her daughter was small, **Rosemary** had worked all her life and had made plans for her retirement. She had envisaged a retirement of shared activities with her husband and was shocked by his death. Involvement in learning proved to be helpful during this period of adjustment to both retirement and bereavement.

*"We had both worked very hard all our lives and we had many plans for retirement together. My husband died shortly after he retired so I really had to rethink what I was going to do. Bereavement is very difficult but you have to learn to cope. Luckily I still had my singing. That's how I came to join U3A. I was approached to become a member of the choir. At first I thought I would just go to the choir but then I discovered there was a whole range of things I could do. Now the problem is fitting them in with my other activities."*

Bereavement can be a trigger to taking up new activities. After the initial grieving the widow/widower acknowledges the need to establish a different independent life pattern and make new acquaintances. Joining a learning



organisation can provide access to social contacts, helping to ease this process of adaptation.

Like Bill in the first cohort, neither Sidney nor Henry was prepared for retirement. Sidney was self employed and working from home:

*“I just thought I would keep on working but gradually the work dried up. One day I found myself sitting in my office with nothing to do. It was very depressing. I was going into the office every morning pretending to work. Eventually my wife took me in hand and pointed me in the direction of a few classes with U3A. We turned my office into a study. I read there and prepare work for classes. I enjoy the studying – its as though I am back in my teens again. We also got together with a few friends to form a group for outings to theatres and museums. That has been very successful and has deepened the friendships”.*

Here we see a return to the love of learning that Sidney enjoyed as a youngster. He describes it as learning for learning’s sake, revisiting old interests and a chance to reflect upon things at his own pace.

Henry was catapulted into retirement and was the least prepared of the entire sample. He was suddenly hospitalised and underwent major heart surgery, followed by a long period of convalescence. A return to work was out of the question. His life had been work-centred. He identified himself by his employment. Retirement was an enforced disruption of his pattern of life. Unlike the other two men he had no established leisure pursuits and was worried about how he would cope with idleness.

*“Without my wife I would have gone crazy. She managed to get me interested in things. She took me along to a small social group. At first I was horrified. It was mostly old ladies, drinking cups of tea and gossiping. Then I got involved in the organisation side, arranging lifts, inviting speakers and planning outings. I feel really committed to them now – I wouldn’t want to let them down. We also found U3A through friends. I*

*didn't think I would fit in there. I had never done any studying. But my wife persuaded me to go. Now I love it. It has opened up so many new interests. Nobody seems to care I was once a barrow boy."*

All three men found the transition from work to non-work difficult and in Henry's case distressing. For them retirement was a significant learning event (Antikainen 1998). A new structure for day-to-day living had to be developed and a new identity forged. This is especially challenging for men who define themselves by the job they perform and where the daily routine has been dictated by the demands of that job (Gee and Baillie (1999). Henry had no established pattern of participation in any thing other than work. For him the challenge of retirement was to create a completely new way of life as well as a new persona. In later life, to his surprise, he has found pleasure in voluntary work and has discovered learning in an environment where he feels accepted. Gaskell (2000) noted that older learners in the non-formal context welcomed the feeling that in retirement there are no hierarchies, no sense of having to compete to be best in the group.

These men all acknowledged the role of their wives in easing the transition into retirement. With later cohorts we shall see that women appear to adapt to retirement with comparative ease and have clear ideas upon how they wish to spend their newfound free time.

### **COHORT 3 BORN 1930 TO 1931**

#### **Childhood and formal education      pre 1947**

Those born in the 1930's were subject to more instability in their schooling than the earlier cohorts. World War Two impacted on both school and family life. Schooling was disrupted, evacuation split up families, fathers were away from home, mothers of all but the very young were drafted in to work. The image of the mother based at home was being challenged and the pattern of family life was changing.

**Joyce** (born 1930). Her schooling was extremely disrupted because of evacuation and bombing. She was probably in 20 different schools in different parts of the country:

*“I can’t really remember any of them – I never knew what was going on- especially in Glasgow I didn’t have a clue. I only know I loved history. The last school - I was there for all of three weeks – I had to go there to get the leaving certificate on my fourteenth birthday. I could have started work the next day. I wasn’t happy to finish school. I felt there was a lot more I had to know. All my life I have felt unsure of myself. – Most people are far better educated than I am. I was supposed to start a course in textiles and fashion design but the day before I was due to go there the technical college was bombed. By the time they had managed to organise the course elsewhere I was working in a dressmakers’ shop. From then on it has been self-education.”*

This somewhat extreme example of education disrupted by war serves to illustrate how doubts about the adequacy of one’s education can be carried forward through life. Joyce’s response has been to continually seek out opportunities to learn. She describes herself as a lifelong learner, continually trying to compensate for something that was snatched away.

**Ruth** (born 1930) has similar feelings of deprivation. She was doubly deprived of both education and of family life. Following her parents divorce, Ruth and her sister went to live with the mother who was unable to cope. Ruth ran away from home several times and was eventually evacuated to South Devon. She had been offered a grammar school place but lost it because of evacuation.

*“I went to a Central school which I enjoyed. The teachers were very good and I had kind foster parents. Those years were really very nice and I was doing well in school. I could have stayed there and done School Certificate. But then as soon as I was 14 my Dad wanted me back home. I was supposed to do a Pitman’s course but my Dad said: ‘You are old*

*enough to leave school and I need you to work with me'. That upset me. I didn't want to leave. But I didn't have much choice".*

Joyce and Ruth both spoke of having their education cut short, partly by war and partly by parental pressure. They felt that learning was something valuable for which they had to struggle. This is perhaps the idealisation of education referred to by Antikainen (1998). Both women stressed how they had encouraged their own children to value education.

Some children were fortunate enough to be cushioned from the impact of war. Sheila (born 1931) described her background as middle class and perhaps rather sheltered. She remembered the war as being quite exciting with gas mask practice at school and sandbags around the house. Family life was comfortable and stable. During the war she passed the scholarship exam to the local grammar school but, as it was a mixed school, she refused to go. Her parents scraped together the money to pay the fees at a small private girls school which, with hindsight, she feels was not very good, much of the tuition being rather mediocre. After School Certificate she found a job in the local library, fulfilling her parents' ambitions for her. At one point she had thought of becoming a teacher but was dissuaded by her parents:

*"I suppose Mummy pushed me towards the library, she always thought that the girls who worked there seemed very nice. At one time I thought I might become a teacher, but my parents talked me out of it. They wanted me to stay cosily at home."*

For the first time we are seeing doubts being expressed about the adequacy of initial education. Previous cohorts felt that they had been provided with the basic tools and they were equipped to move on to work and life. The women in this cohort believed they needed more. All three had their own ideas of a future career but a combination of external events and parental pressure prevented them from pursuing their ambitions.

**Transition to work and early adulthood** in the post-war period

The women from the thirties cohorts were beginning to challenge the norm of leaving school and going straight to work. They would have preferred to continue in school and yet they fell in with the wishes of their parents. Reflecting on their teenage years and informed by their lifetime experiences, these women were able to recognise the constraints imposed upon them by historic, cultural and economic circumstances. Joyce and Ruth both had ideas of embarking on post school education with a view to training for a career, but in 1944 the future was uncertain and parental attitudes were instrumental in shaping the path that their children would take. It seems that the narrowness of parental aspiration erected a barrier to the ambitions of the children.

Joyce felt that her parents were caring but not really interested in education. She would have liked to be a fashion designer but her parents were not very encouraging:

*“The bomb that fell on the technical college changed the course of my life. By the time the course was set up again three months later I had found a job and the money was useful. My Mum and Dad were pleased too; they weren't going to push me into taking up the place at college. Mum always wanted me to have “a nice little job in a shop, until you get married”.*

Joyce worked as a dressmaker, and by the time she was 21, in spite of having no formal qualifications, she was running her own shop. Ten years later she married and, after the birth of her daughter, relinquished her business and became full time housewife and mother, taking on the role envisaged by her parents.

*“I was never apprenticed. The sewing skills I picked up as I went along from the people I worked with. After a while I decided to do some evening classes to learn design and pattern cutting. I don't remember how much the classes cost. They must have been cheap because I wasn't earning very much. No one pushed me into doing the classes I just wanted to be better at what I was doing. After a few years I realised I could make more money*

*working on my own instead of receiving a poor wage from someone else. I already had a few private clients and I enjoyed the independence”.*

It is apparent that training for a job was not given a high priority. People expected to learn skills as they worked. There was no obligation to go to classes to improve skills. Attendance was a question of personal choice and was self-financed.

Ruth also worked in dressmaking but not from choice. When she was 14 she returned to live with her father.

*“I did start a Pitman’s course and was enjoying it. But my Dad took me out - he wanted me to work in his clothing factory and also to help at home. I did sewing and alterations- I had never been taught – just picked it up. All the skills I picked up as I went along. I did the cooking and cleaning at home. My stepmother never did a thing. If any thing went wrong my Dad would hit me with his belt. If I came in late I was in trouble.”*

Ruth received no formal training in dressmaking and no pay. She was obliged to pick up the skills as she went along. Learning skills from colleagues seems to have been normal practice in this occupation. She was indeed exploited by her father who expected her to run his home and help out in his clothing factory in return for pocket money. Eventually, aged 19, she left home, found work in a dress shop and went to live with a friend. *“I have had to be self-sufficient. I have lots of practical skills and they are all self-taught. I learned to cook from books or by asking friends to show me.”* The urge towards self-education is evident in both Ruth and Joyce, who share a sense of having missed out on their schooling and being pushed into work not of their own choosing.

Sheila of the same cohort conformed to the to the norms of middle class expectations. Her job in the library was a respectable situation for a well brought up young woman and would serve her very well until marriage came along. She had not enjoyed the exam experience and did not plan to continue in formal education when she went to work in the library. Her parents felt they were

serving her best interests by discouraging her teaching ambitions and encouraging her to take up congenial employment close to home.

*“I just imagined myself surrounded by books all day. I had always been an avid reader. However I soon discovered that it was much more complicated than I had imagined. It wasn't just books –it was people as well and knowing how to make them feel comfortable in the library. You needed people skills. I was terrified at first but I suppose I learned by watching the other library assistants. They were all so friendly. In the end it was helping the public that I liked the best. The librarian encouraged me to study for the librarianship qualification. I found it difficult but I made it in the end. It was mostly evening classes and occasional day release. It must have taken me about eight years to qualify.”*

Again we see how skills for coping with work and life were acquired as the need arose. This was predominantly through incidental learning at work, through the help of friends or simply learning through living. Sheila only engaged in formal learning because it was a requirement of the job. She found the formal study arduous and believed that the day-to day work experience was of far more value.

### **Marriage and Parenthood     1960's onwards**

The three women in this cohort illustrate the ability of women to juggle work and domestic commitments and still fit in learning activities. All worked for a substantial period before marriage and before having children. Two of them returned to work once their children had started school and all told how they learned from and with their children. They all attended local authority classes at various times during this period. This they considered a leisure activity, making up gaps in their knowledge, or sometimes just for pleasure. This should be seen in the context of a period when there was an expansion of 'accessible, joyful, neighbourhood-based, cultural adult education' (Stock 1993)

We have seen earlier how Ruth picked up skills she needed during her early working life. This continued after she married:

*“When I married and joined my husband in his business I learned how to do the ordering and the bookkeeping. I made a few mistakes at the beginning but it all worked out. I didn’t enrol for classes I wasn’t interested in a qualification I just wanted to know how to do it. So I asked a friend to explain things”*

The arrival of children was the impetus to push her towards formal learning and also towards involvement in her community. As a consequence of the war and family break-up Ruth’s religious education had been non-existent. When her sons reached Barmitzvah age she decided to take steps to remedy this.

*“I was upset that I couldn’t help them. So I went to Hebrew classes. Then I became involved in the social life of the synagogue and gradually made up for all those things in Jewish life that I had missed out on as a child. Later I took on some of the social organising in the synagogue and I was on the committee of the PTA for the boys’ school. I guess I love organising.”*

**Sheila** was dismissive of the learning episodes in her adult life. Study for the librarianship exams had been serious education, but classes attended for pleasure were not regarded as important and were only mentioned after probing. Her extensive musical knowledge had been developed as a leisure pursuit together with her husband. However, without prompting, she declared that the most profound learning experience had been the time spent with her children

*“I loved being at home – it was time to be Sheila. I had known nothing about children but I loved being with them. They were such interesting creatures. We were always busy doing things, developing their interests. I suppose it was the librarian in me, or the would-be teacher. I was always encouraging them to find out things. We did craft things and made scrapbooks. It was all very satisfying. Later when they were in school I found the work they were doing interesting - it widened my horizons. By comparison my own education had been very narrow - just geared to passing exams.”*



Sheila had spontaneously identified the time spent at home with her young children as a period of learning, when she felt that they were discovering things together. She also managed to fit in local authority classes with the aim of self-improvement and in an attempt to learn the practical skills she had missed out on at school: *“I’m not much of a housewife, but I did try to improve. I went to sewing classes and cookery with the local authority, but I wasn’t very good at them. Pottery was more successful. Then I started French again when we started travelling to France”*.

Joyce was the only interviewee to describe herself a lifelong learner, pursuing learning for learning’s sake. She has no formal qualifications and describes her learning activities as leisure pursuits. Although a late reader and from a home where there were very few books, she has read avidly all her life.

*“When I left school I felt I ought to be reading great cultural works like Tolstoy and Dostoevsky. I found them very heavy going. I also loved science fiction. I liked going to the library. It felt very special. I needed to educate myself, so I started to go to museums and galleries during my lunch break. It was possible some days to fit in a lunchtime lecture. Or I would walk around looking at interesting buildings and then find out about them in the library. Later when I met my husband we embarked upon theatres and opera.”*

This programme of self-education continued after marriage and after the birth of her daughter. Like Sheila, she enjoyed fostering childhood interests. Some mothers had initially denied involvement in their children’s learning, assuming that they were being asked about help with homework. However when the question was broadened they talked enthusiastically of visits to museums and libraries and places of historical interest:

*“I had never been to castles or museums when I was a child. It wasn’t possible during the war. But I don’t think it would have occurred to my parents to take me. When my daughter was doing a local history project, we searched the local archives and found out about our street and the*

*surrounding area. It was fascinating. Later I read everything I could find about local history.”*

Once her daughter was in school she allowed herself one day a week at the City Literary Institute as part of her programme of self-education.

*“ I started with archaeology and it just went on from there for 26 years. I tended to choose the course according to what would fit in with my domestic routine. It was my weekly treat. In 1988 one of the tutors persuaded me to do an Access course. I didn't think I could do it but I enjoyed it. I was offered a place at university but I didn't have the courage. It would have made too many difficulties in my family life.”*

This was seriously planned learning, following a formal programme but definitely regarded by Joyce as leisure. University would have been a step too far from her perceived role in life as housewife and mother. Nor did she think she could cope with examinations. She has continued with her programme of self-education, compensating for what she believed she missed during the disruptive war years. Holidays have usually been study weeks and learning activities have continued into retirement: *“I guess that everything in life is educational. Whatever you do a little bit rubs off. My view is that whatever you do, whatever you experience- it adds a bit more to the jigsaw of your life.”*

All the women in this cohort have used their learning activities to make up for what they regarded as inadequacies in their initial education.

### **Retirement**      mid 1990's

Women who had been in employment seemed much better prepared for retirement than the men. They welcomed the prospect of a new phase in life with freedom to pursue neglected interests or take up new ones. They were retiring with a purpose in mind whereas the men had no clear plans. Some confessed that their plans for learning had perhaps been over ambitious, but all were enjoying what they were doing and were involved in far more activities than they had anticipated.

*Sheila: "I planned a lot of craft projects and gallery visits and I would have loved to go back to ballroom dancing. Unfortunately my knees thought otherwise. Still other things came along – especially the computer. I am discovering new things all the time. I would do more classes only things clash and there isn't enough time in the week."*

In common with the other fulltime housewives, Joyce does not recognise that she has retired. She continues with her normal routine but on the recommendation of friends she and her husband joined U3A. She finds having classes close to home an advantage, and appreciates the lower costs. She also likes the social contacts afforded by the classes: *"There wasn't the chance to make friends with people at the City Lit. They were always rushing off to their next class"*.

Ruth welcomed the sale of the family business and uses her new found free time to fit in three classes per week but would like to do more. She is a computer enthusiast, busy writing her life story. These interviewees frequently mentioned the increase in confidence generated by participation in informal learning. The relaxed atmosphere, lack of pressure and the non-hierarchical structure of the groups are all conducive to a positive outcome:

*"There is no pressure to achieve and you feel that the whole group is supporting you, interested in what you have to say. I am learning so much, almost without noticing. I go home feeling very positive"*

The perception of retirement offering free time was common to all the women who had been in work. It was regarded as a bonus to be enjoyed, whereas the men saw this unaccustomed free time as a problem. Gender differences in attitudes to retirement will be discussed in the summaries at the end of the data presentation.

## **COHORT 4 BORN 1933-35**

### **Childhood and formal education      between 1938 and 1953**

Cohorts 3 and 4 were originally one cohort but were divided when it became apparent during the interviews that the opportunity structures for those born in 1933 or later were different from those available to earlier generations. During the schooldays of this youngest cohort, as a consequence of the Education Act of 1944, the leaving age was raised to 15 and some form of secondary education became available to all. The social and economic climate changed with the end of the war. The Welfare State came into being relieving financial pressures for the poorest families and we begin to see assumptions about the gendered division of labour being questioned. The three members of this cohort were moving towards the end of their initial education as these changes were coming into operation and their experiences illuminate the tensions that such developments produce.

**Rita (born 1935)** was happy to conform to the cultural norms and expectations of her family and follow the pattern of behaviour established by her siblings:

*“ I was happy at school, but I was also looking forward to leaving and going to work like my older sisters. That’s what everyone did in our area. The school became a secondary modern school, but we didn’t notice much difference. We just had to stay one year longer. They started a commercial stream and I was able to learn typing. So there was no problem finding a job.”*

This was 1950 and employment prospects for young people were good. Rita felt she had sufficient skills for the employment she was to follow, so there was no incentive to continue beyond 15. Moreover it is unlikely that her school was able to offer any suitable courses. She was following a pattern established by her sisters and saw no need to question it.

Irene (born 1933) found herself in a Junior Technical College [one of the arms of the tri-partite system introduced by the 1944 Act] and was enjoying an art course. However she did not continue beyond the statutory leaving age. Her primary education had been during the war:

*“I don’t know how I felt about school. I didn’t really think about it. It was just something you did with all the other children. Some parts were good, but I was a bit of a rebel, so I sometimes had clashes with the teachers. I don’t think the war had much impact on me. It was quite exciting really. We used to play in the air raid shelter. Dad was away, so I suppose Mum was in charge. I started an art course, but my mother thought it wasn’t leading anywhere. As soon as I was 15 she pulled me out. I didn’t want to leave but I wasn’t given a choice.”*

Irene is a transitional figure, caught between changing systems. Opportunity was there for her follow an art course and perhaps obtain a qualification, but her family was adhering to a previous behaviour pattern, where children left school as soon as the law allowed. *“Well it was the old story - economics - I would be better off earning a living. I don’t think my parents realised the opportunities that were there”*.

Her mother was conforming to the cultural norm and expected her daughter to follow the usual pattern for working class girls: employment until marriage might come along. In the event, the job she found was rather unusual for a girl at that time (1948). She went to work as a junior in the drawing office of an engineering firm.

*“That’s when my education really started. Straight to evening classes 3 nights a week for six years, I did mechanical engineering in the technical college – which was very unusual then. There were no other girls there. I was the first girl in Watford technical college. In fact there weren’t even any toilets for girls. The principal didn’t want me there. These were his words- I’ve never forgotten them. ‘It is not fitting for a young lady to go into a classroom of boys’. So I thought - OK then –I’ll just get on with*

*work. But the registrar spoke up for me – he was a bit more forward looking and I was accepted”*

In spite of the fact that women had successfully undertaken men’s jobs during the war, we see here a potent illustration, in the immediate post-war years, of the gender stereotyping of work roles. The attitude of the principal could be construed as sexism, although no one was using the term at that time. Undoubtedly, the principal firmly believed that a woman’s place was in the home and that girls were better off training for domesticity. On being if she had difficulties in adapting to this masculine environment, Irene replied:

*“Oh yes. I felt that I had to prove that I was as good as the boys. There was this boy apprentice in the office on the same course. People in the office got together to help me through, so that I could beat him. I was doing exactly the same kind of work but there were no apprenticeships for girls.”*

At least her workmates were beginning to question the cultural norms of the period. Irene admitted that she found both the studying and the work difficult, feeling isolated as the only woman in an all male work place.

The third member of this cohort did take advantage of the new opportunities in secondary education, but not without problems. Mary was born in 1934 and suffered disruption of her primary education because of moves around the country during the war. We see the same doubts about the quality of her primary education as with members of the previous cohort.

*“The stages I had reached never matched up with the schools I moved into. I had started school at 4 and learned to read early. I moved to a school where they hadn’t yet started reading and spent many hours in the corner of the classroom reading alone. The next school I attended had already taught hand- writing so I was never taught how to form letters – I just made it up for myself. I seemed to survive but I never felt really confident about any of the basics. I passed the 11+ and went to a girls’ grammar*

*school in 1945. It was the first wave of working class children to get free places in grammar schools. We felt a bit like pioneers, having to prove that we were as good as the traditional intake.”*

Working class children found themselves in an educational environment where the values being promoted were predominantly middle class. There were anxieties about fitting in and also guilt about not defending working class culture.

*“I was excited to be going to the grammar school – it was a big adventure- but I was over-awed by the building and terrified of all the petty regulations. You could not leave the premises unless you were wearing gloves (I was constantly losing mine) – you had indoor and outdoor shoes and hideous hats. Ties had to be of a certain length and skirts no more than two inches above the knee when kneeling. We knew all these things were silly but quietly accepted them. I was also very worried about my accent so tended to keep very quiet. I always thought that everyone knew more than I did and that one-day I would be found out. Long after I left school I discovered that many of my fellow pupils shared the same anxieties.”*

These last two women were in the vanguard of change. Irene was prepared to challenge the norms and followed a career that was normally regarded as a male preserve, whilst still satisfying parental wishes to be earning. Her training was not easy, having to be fitted in around work. Mary found herself in a situation that none of her family or friends had experienced and not sure what was expected of her.

### **Transition to work and early adulthood** post 1948

We saw earlier that Rita and Irene left the newly formed secondary schools at 15. Rita had never expected to do anything other than go straight to work, and Irene soon had any ideas of a career in art quashed by her parents. Work was seen as the sensible option. Rita had learned her typing skills in school and moved happily into work, finding no need for any further training. She had a full social

life with time for sport and claimed to have done no post school learning apart from picking up office practice from her colleagues.

Irene combined work with study and took six years to qualify. Like Sheila, two years her junior, she found studying difficult especially the tight routine of regular evening classes at the end of the working day. Neither regarded the learning as pleasurable. It was undertaken because of the requirements of employment. Often they could not see the relevance of their studies to the work they were doing. Skills for the day-to-day management of work came through the help of their colleagues. These two cases can be seen as early examples of women beginning to follow similar career paths to men and being subject to the tensions that accompanied such change. They found themselves in learning environments that were male orientated whilst the cultural messages they received from their family and friends were still pushing them towards the domestic role.

The third member of this cohort was also receiving mixed messages. The transition of working class children to grammar schools was often difficult. They had fears of being distanced from their cultural roots and often felt ill at ease in an environment that their family and neighbours barely understood. There were pressures to revert to the normal progression into work, once the statutory leaving age was reached.

Mary had gone from a working class family to girls' grammar school. Her mother was her main influence and support. Her father did not accept the situation easily.

*“ Mum was very pleased I was going to the grammar school. She had left school at 13, and always felt she had missed out. Dad was constantly sniping at what was going on in school. There were lots of things to be signed and he always made a big show of signing, making it clear that he didn't think girls' education was to be taken seriously. You'll only get married – then all this fancy stuff will have been a waste of time.*



*Neighbours too would put pressure on my mother, asking, "When is she going to get a job? You could do to have some money coming in".*

The father is clearly not ready to accept the changing role of women, preferring the traditional route for daughters through to marriage. There are indications that parents were still operating in terms of an older educational system that they understood. Significant numbers of pupils withdrew from grammar schools as soon as they were 15, leaving before taking an examination.

*"Not everyone stayed the course. I can remember there were girls who left at 15, even when their parents had signed to keep them there until 16. The school was very disparaging about these so-called dropouts. It was never clear why they had left. Perhaps the families needed the income or perhaps the girls were uncomfortable with the academic ethos of the school. I can remember feeling distanced from the people I had been with in primary school. We didn't have much to talk about any more."*

Some years later the father's attitude had softened and he did not oppose Mary's decision to go to university. In the early fifties it was still very unusual for girls to go on to higher education but the social and economic climate was changing, tuition was free and maintenance grants were adequate.

*"At last Dad said, "It's your choice. It's your life." I was educated at state expense up to the age of 24. I have always felt grateful and felt I should pay something back. That's a very unfashionable sentiment today. At university I met up with students of similar background to my own, though not many girls. I didn't feel such a freak any more"*

### **Marriage and parenthood     1960's onwards**

Of the three women in this youngest cohort two had started work at 15, one happily the other reluctantly. Rita had enjoyed her work, had a pleasant social life, mostly centred around sport. She was never involved in formal learning activities. When she married in her early twenties, she began to acquire DIY

skills and became a keen gardener. After emigration to Canada with her husband and three young children she decided to learn French:

*“It seemed to make sense. We were living in a French-speaking town and I wanted to communicate with the neighbours. Also the children were speaking French at school. It was quite a low-level course, with no tests or examinations, but I became reasonably fluent. My husband just picked up the language as he worked. When we came back to England ten years later we soon forgot what we had learnt. It was only after the children had all left home that I took it up again in a local authority class. It was a good opportunity to meet other people. I had time on my hands and we had just moved in to a new area.”*

Here we see a subject studied initially for the pragmatic reason of needing a skill for daily life but later the same subject is used as an entrée in to a new social group. In spite of minimal initial education Rita had no doubts about being able to take up learning again when she could see its relevance to her daily life.

**Irene** the reluctant school leaver described much of her learning in adulthood as learning to cope. After marriage and having children she continued working free-lance from home.

*“I seemed to be learning all my life, but none of it could be described as organised, except for the luxury of art classes – they were my treat. Most of the time I was just too busy with work and home and family. It was chaotic at first. I had to learn to be disciplined and organised so as not to get behind with the work. My children became very self-reliant”*

After 25 years in drawing offices and working free-lance she found herself in new situation where again coping strategies were called for. She decided upon a career change and offered her services to the technical drawing department of her local school. She thought she would be offered training but instead found herself in front of a class without even a copy of the syllabus.

*“I really was very naive. I expected to be led into the job gently but I was just given a timetable and expected to get on with it. I was terrified – I should have had a role model, but they were all men, very laid back Their style of teaching was no use to me- I had to develop my own style. I literally learned by doing. At the beginning it was just a matter of survival and getting the ‘big lads’ on my side. Then came IT. It sounds crazy, but in the early days of introducing IT to schools, you only had to say you were interested and you found yourself teaching it. It was a new subject and no one knew much about it. I went on one or two short courses, but in the end you learn by doing - and by keeping one lesson ahead of the class”*

This is the disjuncture of biography and experience described by Jarvis (2001). Irene did learn what was needed to survive and even prosper. By the time she reached retirement she was in charge of the teaching of Information Technology. This seems somewhat surprising during the seventies when it was generally assumed that teachers would be trained and qualified. However teachers have always learned by doing, by thinking on their feet.

The third member of this cohort, **Mary**, went on to higher education and trained to teach. Like Irene she considered teaching to be a constant learning process and found very little time for other learning activities:

*“After a day in the classroom you didn’t feel like doing anything too demanding. I did things like keep-fit and yoga. With my husband I tried a car maintenance course. Under supervision we learned how to take an engine apart and then reassemble it. I have never tried that since. I can change a wheel but I learned that from watching a friend. Things like cooking and sewing I learned from books”*

After ten years teaching she took a break from work to be at home with her children. Like other women in the sample she found this period very rewarding and enjoyed learning activities and outings with the children.

*"I suppose that the teacher in me didn't switch off. It was fascinating to see things through the eyes of children and to coast along with their intellectual curiosity. In childhood everything is a learning experience – and you learn with your children."*

After seven years it was back to teaching and a very busy life until retirement. Asked about learning during that period she said:

*"I must have gone on quite a few courses to update techniques, but you just regard it as part of the job. Then you absorb so much chatting to colleagues in the staff room or from the educational press. You don't set out to be informed – it just happens along the way. Perhaps some people are more tuned in than others and are always aware of new ideas. Leisure time learning was purely selfish – to make space for me to escape. You have to be so disciplined when you are juggling a career and family-even your leisure has to be timetabled."*

With Irene and Mary and with Sheila from the previous cohort we are seeing a change in the way women regard work. They are thinking in terms of a career, not just a job. They are the only people amongst the interviewees who were involved in formal education post school. Towards the end of the century women were beginning to embark upon career paths in a similar way to men. Yet they were also maintaining their role as wife and mother. These three women expressed the view that learning, either deliberate or incidental, was at the centre of their everyday work. Leisure time learning they regarded as an escape when the daily routine became too stressful.

**Retirement**      1990 onwards

Mary retired earlier than her husband and filled the intervening years with supply teaching and Open University courses:

*"It was a deliberate decision to retire early, I wanted to do other things with my life .I felt stale after so long in the same job. Returning to study gave me an opportunity to reflect upon my working life and try and make*

*some sense of it. At first it was all a bit overwhelming. I had done no academic studies for more than thirty years, just learning associated with work and some leisure time learning, nothing with much rigour. It was quite difficult, but worthwhile. When my husband retired we discovered U3A. There you have the advantage of social contacts. You don't have that with the OU. We both felt it was important to make new social contacts, previously we had relied on work colleagues for socialising We have made some very good friends and become very involved in the organisation"*

**Irene** has retired only recently feeling but is enjoying the freedom She has more time for art but admitted that she expected to follow more courses: *Timing is the problem, the things I want to do all come at the wrong time to fit in with the family routine.*

**Rita** is only partially retired still working two days per week. Her only learning commitment is a weekly language class. She swims daily and attends to her grandchildren after school each day. All the women in the two youngest cohorts lead very busy lives and seem unwilling to slow down the pace of their lives.

## **LIFE STAGES: COMPARISONS ACROSS THE COHORTS.**

### **Childhood and early education**

The low educational base of the current generation of third-agers, born in the first half of the twentieth century, was highlighted in the Carnegie Report (1993). However, as Schuller and Bostyn (1993) explained, this educational deficit was not of their own making, but a consequence of historical events and social attitudes of the period in which they grew up. These life stories illustrated how as children all the interviewees were acting within the economic, social and cultural constraints of their time. Only four of the sample had undertaken formal education beyond statutory school leaving age, the rest going straight to employment. Limited initial education was the norm for the majority of the population until late in the second half of the century. Opportunities to progress to secondary education were few and were dependent not upon merit but on a complexity of factors: availability of finance, gender and social and cultural expectations.

For the most part these early leavers emerged from primary education feeling that they had benefited from school, but also with the sense that there was much still to be learned. They expected to go on learning, not in school, but at work and in their daily lives. Many of them expressed the belief that school was only a beginning and that real learning began with the world of work. This was especially true of cohorts 1 and 2 at school during the 1920's and into the 1930's. They felt that they had been given the basic tools of learning and could carry on from there. They had no qualifications nor did they perceive a need for them. There was no sense of failure or of deprivation. The move into the world of work was a normal progression that was welcomed.

Members of oldest cohorts did not question the cultural norms of their period. They understood that financial restraints and restricted job opportunities placed limits on their choices. Growing up during a period of economic depression, they were aware of the importance of finding a job and contributing to the family income. The members of the second cohort were particularly conscious of the pressures of poverty and the push to conform to local mores. All three were at school in deprived areas at the end of the 1920's; they knew that family finances were restricted. They also saw their peers moving into employment. The decision by one of this cohort, encouraged by his teachers, to continue in education and not to proceed directly to work was, at that period, a courageous step.

Girls expected to work until they moved on to a domestic role upon marriage, whilst boys were looking for steady employment with prospects. Starting work was a significant event for both genders and all assumed that there would be much learning to be done in the workplace.

Changes in attitude to schooling can be detected with the third and fourth cohorts. They were at school during World War 2 and their schooling was subject to varying amounts of disruption. Doubts were expressed about the quality of their early education. These may have been justified. During a period of instability schools were not sheltered from the upheavals in society. The war produced changes in the pattern of family life: fathers were away from home and many

mothers moved into the workforce, taking on jobs previously held by men. The gender stereotyping of work expectations began to be challenged and mothers were becoming more influential in the decision-making which determined their children's future.

The education of two women in cohort 3 was disrupted dramatically by evacuation. They were separated from family and suffered many changes of school. Reaching school leaving age in 1944, their plans to continue in education were aborted by a combination of historical events and family pressures. Both looked back on the end of their schooling with regret, and the experience of having educational opportunities snatched away seems to have triggered a determination to make up the loss. Their learning episodes during adult life were undertaken deliberately with a view to rectifying deficiencies in their knowledge.

The members of the fourth cohort were affected by changes in the organisation of education following the Education Act of 1944. The introduction of a tripartite secondary system and post-war economic expansion led to a widening of opportunities in both education and employment. However the new structures were not fully understood by parents whose aspirations for their children remained narrow. For the majority, in the late 1940's, the pattern was still to leave at the statutory age (raised to 15 in 1948) and go directly into employment. Parents were still envisaging a domestic role for their daughters, as did the girls themselves. We saw that some of the women in the younger cohorts had ambitions to continue in education. However their ambitions were held in check by parental caution and only one stayed in school, the rest went directly to employment.

Antikainen (1998) noted that his interviewees rarely spoke of significant learning events occurring during general school education. With this sample, significant events in primary education were occasions when things went wrong, such as failing an exam, feeling inadequate or when education was disrupted. Amongst the oldest interviewees there was little criticism of the education received and an acceptance of what was on offer. There was frequent mention of the influence of individual teachers in awakening interest in particular subjects and imparting

enthusiasm to seek out information. Teachers' names were often remembered. Teachers also had a role in widening the ambitions of pupils. Here we are seeing the significant others described by Antikainen (ibid). Rarely were parents mentioned as the one's who fostered ambitions. Rather they acted as a controlling force, urging prudence and conformity to the cultural norms of their generation. Mothers rather than fathers exerted the most influence in this respect. The attitudes of one's peers also acted as a deterrent to continuing in education, fostering a reluctance to step outside the cultural norms.

### **Transition to work and early adulthood**

Choices available to school leavers in the first half of the twentieth century were limited by economic and cultural factors. Many capable of following an academic education were prevented from doing so because of lack of finance or in some cases there was a reluctance to break away from the social milieu in which they had grown up. Economic constraints, parental wishes, peer pressures and the prevailing culture combined to make work the only option for the vast majority. The older cohorts in this study expected to move on to work because that was what you did at fourteen— it was a rite of passage. With the younger cohorts, coming to maturity in the post war years, these certainties began to crumble.

For the majority of interviewees the post-school period was the time when learning habits were established. Questioning about this stage in their lives revealed that there was confusion around a definition of learning. When asked about post-school learning most assumed that the reference was to vocational training or formal study in college or evening classes leading to qualifications. Any other form of learning was not considered serious enough to mention and was only acknowledged after much probing. None of the oldest cohort had engaged in formal study but there was much incidental learning from colleagues at work and learning from experience. Indeed the members of this oldest group assumed that skills for work would be acquired in the work place and did not see the necessity for formal training. Starting employment and the interaction with work-mates were considered significant learning experiences by most interviewees and workplace colleagues were numbered amongst the significant



others who influenced learning habits across all the cohorts. Occasionally the employer planned this learning, introducing the employee to the various aspects of the work. More frequently the learning was incidental to the work process.

Where skills for work were acquired formally through evening classes or day release courses, the assistance of older workers was still regarded as more useful than formal learning. Study accompanied by examinations for work-related qualifications as in the case of Sheila (librarianship) and Irene (mechanical engineering), were considered a burden that had to be endured, because the system demanded it. The useful learning took place informally in the company of fellow workers. The examinees were conscious of having to measure up to standards and expressed anxieties about their ability to meet them. Although proud of their examination success they were not eager to engage in further formal study. Only the woman who went forward to higher education claimed to find enjoyment in formal education.

There was some engagement in formal study in evening classes by two members of cohort 2. This was undertaken in order to improve work skills and was not regarded as pleasurable, rather a necessity to maintain competence for work. It could also be seen as a response to the high rate of unemployment in the 1930's, seeking to safeguard one's position at work. There was an assumption on the part of employers that workers would attend classes, but there was rarely any financial support.

During the period of transition from school to work and early adulthood most of the interviewees were involved in some form of non-formal or informal learning although they did not always recognise it as such. Rather it was a congenial way of spending free time. Leisure activities were discounted as learning even when it was apparent that new knowledge and skills were acquired. Only formal study leading to qualifications was deemed serious and described as education. Other forms of learning were for pleasure or for dealing with daily living and carried no status. Concerns about the relationship between learning and leisure are still debated by some adult educators who fear that merging educational activities into leisure activities risks trivialising much of what they provide (Edwards and

Usher 1997)). Leisure time learning took place in many contexts: adult education institutes, young people's clubs and church groups or at home within the family. Subjects covered were often influenced by gender. Women's leisure activities frequently involved perfecting domestic skills such as cookery or sewing. Men's studies were more likely to be work related although hobbies were mentioned. It was only later in life, when influenced by partners, that male interests widened.

Learning not immediately acknowledged by the interviewees was the learning required to survive in everyday life. Antikainen (1998) suggests that skills and knowledge needed as coping strategies for managing work and life are usually acquired in informal and non-formal learning situations or through experiences that are incidental to other activities. People acquire the skills they need for a given situation. A similar view is taken by Jarvis (2001) but he extends the thesis to suggest that learning takes place continuously at every stage in life and not always consciously. People learn by constructing and transforming their own experiences of everyday living: 'Learning is the process whereby human beings create and transform experiences into knowledge, skills, attitudes, beliefs, senses and emotions' (Jarvis 2001p.10).

In terms of these concepts, those who lived through war and economic depression underwent intense learning experiences. Gender, individual circumstances and age especially determined the severity of the impact of war upon the lives of the interviewees. The members of the oldest cohort were already well established in work before the war began. The second cohort was just starting work, whilst the remaining interviewees were at school during the war. For women already in work in 1939 there seem to have been very few changes, they simply carried on with the job they were doing but had to learn to cope in difficult circumstances. The war situation led to later marriage for these women, none of whom married before the age of thirty.

For the men, World War 2 produced a great upheaval in their lives and dramatic learning experiences. They confronted painful and frightening events. All were reluctant to speak of their wartime service. The younger men especially felt that at the age of 18 they had been exposed to events for which they were not

emotionally prepared. None had been away from home before. They all conceded that they had been obliged to grow up very rapidly. Yet out of the upheaval came opportunities for learning if not for training, and skills were acquired which were transferable into civilian life. None of the men interviewed had taken advantage of post-war training schemes for ex-servicemen and all experienced difficulties in adjusting to life after the war.

The two younger cohorts, who were of school age and whose education was disrupted by evacuation or changes in family circumstances, suffered adverse effects in varying degrees. However, some felt that as children they had been shielded from the reality of what was happening and had even found some aspects of the war exciting. Fathers were away from home leaving mothers in charge. From this point we see mothers exerting a stronger influence in determining life choices for their children.

The impact of war was greatest upon the two girls who were evacuated and separated from their families and who suffered disruption of schooling. The end of formal education for them came too soon in 1944. Job choices and training opportunities were limited and there was parental pressure to take whatever work was available. Both felt that war had interfered with their chances and shared the view that education had been taken away from them. Neither of these women received training, simply picking up skills from colleagues as they worked. These experiences seem to have triggered a hunger for self-improvement. They attended classes, read constantly, acquired craft skills but there were no episodes of what they would describe as serious formal education.

Those born 1933 or later completed their education in the post-war period and were in a position to take advantage of an improving economy, better job prospects and increasing educational opportunities. Whether they did so was dependent upon their personal disposition and upon the influence of their family. There were tensions and frustrations. During the war new role models had emerged, with women holding posts of responsibility. At the end of the war it was expected that women would return to the domestic scene. Marriage would be their ultimate destination and education for girls was not a high priority. The

generation born in the 1930's began to question these norms. Financial considerations were paramount in pushing them into work but there were also social and cultural pressures. All these younger women were able to identify factors influencing their choices: the narrowness of parental aspirations, the disruption of their education by the war and the expected domestic role for girls. Parents frequently did not understand the newly reorganised secondary education system or the opportunities being offered. Generations who had functioned without formal qualifications were not yet ready to value them in their children.

### **Marriage and parenthood**

The perception of most interviewees was that once they had married and become parents they were involved in very little learning, but their responses did not bear this out. Learning was often an incidental activity associated with child rearing and homemaking, with skills being developed as and when required. Many of the interviewees had considerable craft skills that they claimed to have just "picked up as I went along". When pressed they would admit to having attended courses and workshops – "but that was for fun". All the interviewees commented on the impact of courtship and marriage on learning activities. New interests had frequently been triggered by partners in the early days of their relationship, especially in areas such as music and the arts and these interests were developed and continued throughout married life. Partners and children are significant others who influence decisions to learn.

Activities with children often led to new shared learning experiences within the family. However the arrival of children impacted more on the learning activities of mothers rather than those of fathers. Husbands seemed to have played a lesser role in family life than wives and claimed that work prevented them from taking time out for their children. Having a job and running a home did not seem to prevent the mothers from taking an interest in their children's learning, indeed all the women enjoyed the child-rearing period in their lives. This may be a question of gender roles. The men had grown-up in a culture where involvement in children's learning was considered as a function of the female role. Women's skills appeared to be multi-faceted. Not only did the women have work skills they also developed home centred learning activities and hobbies that

encompassed children's interests. Men's interests were more often work-centred or outside the home. There were hobbies and interests shared between fathers and children but the men did not mention them as important.

Family life was being experienced in a period of post-war economic expansion and social mobility. It was possible to take advantage of the proliferation of locally available and reasonably accessible adult education for adults during the 1950's and 1960's (Stock 1993), and it became easier for parents to provide a stimulating home life. For the women in the sample bringing up children was an opportunity to extend their own learning experiences. An indication of their success in fostering a positive attitude to learning in their offspring is demonstrated by the fact that all the children of the people in the sample followed the formal education path, entered university and went on to the professions. It is not known if these same children have continued as lifetime learners.

Differences between cohorts were less apparent during these years of marriage and parenthood. The oldest women became full time housewives as they had expected. The rest worked during most of their married lives with breaks for child rearing. All but one married relatively late and did not have their children until after the age of thirty. This would make them untypical of their generations. Late marriage and late childbearing may have afforded them a period in their early adult life when they were able to establish the learning habit. The earliest marriages took place at the end of the war, the latest ones in 1965. These marriages were progressing during a period of expansion in both the economy and in the availability of non-vocational adult education. The impression was given that learning opportunities were there for anyone who felt inclined to take them.

For the most part participation was not on a regular basis but dependent on availability of time or when there was a perceived need for knowledge in a particular field. Classes in humanities subjects tended to be followed during less pressured periods of life, classes for practical skills when a project was envisaged. It was noteworthy that those who had been involved in formal

examinations in their younger days deliberately chose less demanding classes at this stage in their life. Exceptionally, one person chose to programme learning on a regular basis into her weekly routine. One day per week over 26 years devoted to non- formal learning was a remarkable achievement.

The image of ladies at home with time on their hands, often cited as the typical participant in leisure time learning, did not emerge from the women in this investigation. The three women who were full time housewives all led busy lives with many commitments outside the home. The women in employment, and especially those in the younger cohorts with demanding jobs, were very skilled at balancing the different aspects of their lives, fitting in work, running a home, child-care and still finding space for learning. For them, leisure time learning was often regarded as a reward, an escape from a stressful routine.

### **The role of learning during the life course**

It would be useful at this point to summarise the role of learning in the life course before moving on to examine the experience of learning in retirement.

Exposure to formal education was minimal for most of the group. Two people were obliged to study for work related qualifications, and did not enjoy the experience. Only one person had studied formally from choice. Formal learning was described as “serious” education and was associated with obtaining skills and qualifications for work. It was not regarded as relevant to the lives they were leading. It was the type of learning that was accorded status and, by implication, other forms of learning were downgraded and considered unimportant. This separation of the meanings of learning and education was noted by Gaskell (2000). She also observed that learning was regarded as pleasurable whereas formal education was considered arduous.

Previous studies have suggested that early success in education predisposes adults to return to formal learning later in life (Sargant 1996; Carlton and Soulsby 1999). Most of adults in this study had no experience of educational success measured by the award of formal qualifications, but neither had they experienced failure in examinations. Their attitudes to learning were mostly

positive. They had left school with an awakened intellectual curiosity expecting to continue learning in the wider world. They regarded their initial education as the springboard to learning throughout life.

As described by Jarvis (2001) and Antikainen (1998), learning episodes were frequently triggered by life events or changes. Such events can be the impetus for improved skills, both for work and for life, and often lead to a widening of one's view of the world or of one's cultural horizons. Moving into the world of work was such an event. Learning through experience in the workplace with the help of colleagues was considered to be the normal and effective route to success in one's employment. Occasionally the workplace learning was structured and systematic but mostly it was incidental to the work itself; skills and knowledge were acquired almost unconsciously. It was felt that learning through interaction with colleagues gave a sense of belonging and involvement with the company.

People change and adapt to new life situations and in the process acquire knowledge, skills, attitudes and beliefs. Such learning could be termed learning from the experience of everyday living. 'The life experiences of a person are the very foundations of educative processes' (Antikainen 1998 p.216). Or in the terms of the interviewees 'you learn through living, everything is a learning experience'. Coping strategies were developed to deal with changed life circumstances: a new job, marriage, bringing up children, economic difficulties, and retirement. Some times there were negative or even painful events, for example, wartime experiences or bereavement, but such experiences can later be experienced as a positive resource. Much of this type of learning was in the home and family context and incidental to life events. Often when specific information or skills were needed for a particular project, courses would be followed, books consulted and more recently the Internet would be accessed. This type of learning was not regarded as significant by the interviewees— it was simply the expected approach to acquiring knowledge, finding out on a 'need to know basis'

Some had deliberately set out on a programme of self-improvement, using their learning to bolster their self-esteem and to compensate for what they believed

they had missed. Although much of this learning was organised and occasionally in a formal setting, it was not regarded as serious learning, but something undertaken for personal satisfaction. The confusion of formal, informal and non-formal learning noted by Percy (1997) and Edwards and Usher (1997) was apparent amongst the interviewees. Classes taken in leisure time were termed informal, even when the courses had been highly structured as with language classes.

Learning as a leisure activity was a concept readily understood by all the sample and covered activities such as art, cinema, music, amateur dramatics, learning craft skills, developing new interests, either with others or alone. All these were considered legitimate leisure activities but not to be set alongside formal learning in their level of importance.

The impression gained from the interviewees was that although learning had played a significant role in shaping their lives, they had not considered it as worthy of special consideration. Learning was regarded as a normal function of human existence. Our ability to survive in life is dependent upon our capacity to learn and adapt to changing circumstances. To succeed there must be a learning approach to life. Whilst learning was often simply for pleasure there was the firmly held conviction that most useful learning comes from lifetime experiences.

### **The role of learning in retirement.**

Discussion of learning retirement will be in two parts. First to be examined is the learning involved in adapting to retirement and secondly, we shall look at the role of learning in retirement.

### **Learning to retire**

Antikainen (1998) and Jarvis (2001) both describe retirement as a significant learning event, where adjustment to a new lifestyle is required. The ease with which the interviewees achieved the move into retirement was not significantly related to age cohort but rather to gender, to personal disposition, and to patterns of life established earlier. The oldest interviewees had already experienced



twenty years in retirement; the youngest was only recently retired and one still worked twice a week.

Three of the four modes of approaching retirement (Gee and Baillie 1999) were observed. The full-time housewives did not consider themselves retired. They exemplify **continuity theory** wherein the basic pattern of life continues with perhaps more time being devoted to joint leisure activities. For them the challenge was to make room in their daily domestic routine for the newly retired partner. Women, who had been in employment, welcomed retirement seeing it as **a new beginning**, offering time to fulfil long held ambitions and embark on new projects. The men were less prepared; in the case of one man not at all. For him retirement came as a crisis requiring dramatic adjustments. For all three men retirement came as **an imposed disruption** and all experienced difficulty in adapting to a new pattern of living. Retirement for some can be a period of instability and loss of identity (Phillipson 1998).

This is especially challenging for men who may have defined themselves by the job they perform and where the daily routine is determined by the demands of that job. Men often establish their identity through work. Being husband or father is almost peripheral and men of older generations grew up believing that the male role was primarily that of breadwinner. With retirement that role is lost and the familiar structure destroyed. They must find a new identity, establish a new routine and possibly forge new social relationships. Giddens (1991, p.202) suggests that a drift in to purposelessness is prevented by the routinization of daily life: 'The threat of personal meaningless is ordinarily held at bay because routinized activities, in combination with basic trust, sustain ontological security.'

The men in the sample appeared to have given little thought to a future without work. The free time they had gained was initially a burden rather than the gift welcomed by the women. The two men who had been accustomed to participating in learning activities, even on an irregular basis, and who had a well-established social life, found that the transition to retirement, although difficult, was accomplished fairly smoothly. However, crucial to their success

was the support of their wives helping them to establish a new pattern of life. The interviewee who was plunged suddenly in to retirement was the sole member of the group who had no experience of deliberate participation in learning and who had been completely absorbed in his work. Again it was his wife who helped him create a new daily routine and who led him towards rewarding involvement in voluntary work and to discover learning. The concept of retirement as a new beginning was eventually accepted by these men but had not received prior consideration.

Gender differences were apparent in both the expectation and experience of retirement. Women leaving work had clear ideas of what they hoped to do with their new life and appeared to have little difficulty in adapting to change. Their main concern seemed to be to maintain a fully occupied life style. Women seem able to encompass several identities during the course of their life. They see themselves as wife, mother, housewife, worker, and now a retired person. Only the role of worker has disappeared, their other roles continue. Their domestic routine remains intact giving the day a structure and they have now acquired extra free time to devote to new activities. Some would argue that women do not retire; they simply adjust the balance of activity in their daily life.

An early response to retirement for everyone in this group was to enrol in classes. For the oldest interviewees in the early 1980's, this had meant local authority classes. Later as the local provision of general/liberal education for adults was squeezed almost out of existence (Stock 1993, Bell 1996, Tuckett 1996) there was a move to community-based learning (churches, voluntary bodies) and organisations such as the U3A. Older retirees spoke of the desire build on shared interests and attend classes together. Younger respondents made a point of pursuing some activities apart from their partners. Given the inevitability of bereavement, development of independent activities may be sound practice.

The trauma of bereavement frequently leads to involvement in learning. The widows in this sample had envisaged retirement shared with their husbands. They had found the adjustment to widowhood painful. Eventually, recognising

the need to establish new relationships and maintain social contacts, they had joined U3A. Initially their purpose was to socialise but both were drawn into more activities than they had originally envisaged. The learning aspect had proved to be an added bonus.

### **Learning in retirement**

I have chosen to include some interview data relating to learning in retirement in this section. Using the words of the interviewees gives more immediacy to the discussion.

Retired people have become free agents within society since there are no prescribed structural roles to be played (Jarvis 2001). Retirement stretching over many years of active life is a new phenomenon to which adjustment is required. The life style of older people is undergoing changes, especially among the more affluent (McKie 1999). Chronological age is increasingly being discredited as an indicator of age norms and lifestyles and older people are beginning to indulge in a wide range of leisure pursuits, learning being just one of them. Gillear (1996) suggests that a new phenomenon of third age consumers is emerging in contemporary culture, where older people are being offered a lifestyle for the “golden years”.

The members of the sample did not regard themselves as consumers of a new life-style, but acknowledged the wide range of cultural and social opportunities available to them and felt that age was not a bar to participation in anything they wished to do. In this they could be said to be refusing to conform to ageist expectations and to be challenging theories of structured dependency. They were uncomfortable with the notion of a market in learning. Most of their learning experiences in the past had been in local authority adult education classes, within the liberal/humanities tradition and they held firmly to the concept that knowledge and access to it should be free, or at least subsidised. Adult education classes are now expensive and mainly vocationally orientated with certification. These people are not seeking qualifications. Examinations and certification are considered a deterrent to participation. Targeted provision for the over-fifties, set in place in response to governmental requests to take account

of the learning needs of the increasingly elderly population, was rejected by the sample. It was seen as patronising in tone, taking as its basic precept the concept of the dependency of older people. A narrow choice of activities is offered and there is a strong welfare bias. There may well be a need for this type of provision but the members of this sample have their own views on their needs and feel they are not yet ready to have their learning organised for them.

Most of the sample had decided to learn with the U3A on the recommendation of friends, although some had read about it in the national or local press and one had joined on the advice of her doctor to combat depression. The timing of classes during the day attracted them, together with low costs (one annual fee covers as many classes as you can fit in). When asked directly about motivations to continue learning in old age, the initial responses tended to be along well-rehearsed lines: the desire to remain mentally active and to develop new interests. No mention was made of the health benefits to be derived from learning (Dench and Regan 2000) but golf, swimming and walking were cited as activities undertaken to maintain physical fitness. Social contact and making new friends was felt to be particularly important by the bereaved (two of the sample) and also by the men who upon retirement had lost some of their previous social relationships. All spoke of the need for activities outside the domestic routine and the importance of remaining involved with life outside the home. None was yet ready for disengagement or withdrawal from society (Cummings and Henry 1960).

The replies became more expansive when they were asked about the benefits they had gained from learning with the U3A and confirmed the opinions of Chène (1994) concerning the added value produced by community-based learning groups. She focuses on the importance of being with others as being a fundamental human need. The sense of well being experienced is a spin-off from learning activities.

There was appreciation of the relaxed informal atmosphere of the classes, especially when they are held in private homes, rather than classrooms. Lack of pressure, and the non-hierarchical structure of the groups were thought lead to

increased confidence and there was appreciation of the shared endeavour and camaraderie:

*“Everyone works together, and it is good to have a group leader of your own generation. You don't mind making mistakes. I wouldn't feel so confident with a young person. When I did the computer course at the local college there was a young tutor. He made me feel stupid. He didn't understand my difficulties”* (Emmy)

Some groups rotate the role of group leader whereas some have just one. The enthusiasm of the leaders was considered paramount. It was felt that enthusiastic leaders of one's own generation serve as role models, demonstrating how intellectual activity can continue in later life. Younger tutors may unconsciously display ageist attitudes. Learning in a peer group avoids the sometimes-remembered fears of the teacher/ child relationship. Some who would never have considered becoming an educator have been able to lead groups and share their enthusiasms. This was especially the case with music appreciation groups and literature groups:

*“I love that class. Do you know why? The people in it are so brimming over with enthusiasm. Everyone is bringing his or her own knowledge and experience to whatever we are reading. It is so enlightening. They are interesting people - it's quite exciting. When I did the City Lit courses I was in awe of the tutors. I didn't feel my contributions were worth much. Now I feel confident to express my views.”*(Joyce)

A feeling of security from being with people of similar interests and similar generational history was noted:

*“You are not afraid to admit difficulties, both with learning and with other problems. I feel comfortable with these people - they have lived the same kind of life as me, had similar experiences. It is comforting to know that other people have the same worries and fears as yourself. You don't have to go into detail, but people understand”.* (Rosemary)

Several respondents commented upon the caring attitude within the groups and told of new friendships. It is usual to stay for a chat after class, to offer lifts and to telephone if someone is absent. Most admitted that the social aspect had been their first motivation to join the organisation and that the subject to be studied was of secondary importance. Initially, attendance at a class may be an excuse to be with others but there is then the discovery that those with whom one socialises provide the stimulus for what is learnt and for the mode of learning. The concept of learning from each other, that students are teachers and teachers are students was Laslett's founding brief for the U3A.

Students are heartened and often surprised at the progress that they make and at the widening of their horizons. The ageist notion that old age is a barrier to acquiring new knowledge is being refuted. Four women in the sample, as a consequence of hearing other U3A members talking of their experiences, had enrolled for the computer course. Their individual motivations are quite different, but all are excited to find that they enjoy learning this new skill.

*"I want to be able to use the Internet for information and research and perhaps try some creative writing" (Joyce)*

*"I want to write my life story and perhaps later do some family research" (Ruth)*

*"My grandchildren all live abroad I want to keep in touch by e-mail" (Emmy)*

*"I wanted to be able to keep up with my grand children, understand what they are doing, but I have since found other possibilities: cataloguing my music tapes and CDs, scanning in photographs and surfing the Net. It's all very exciting." (Sheila)*

There is unintentional/incidental learning and opening up of new areas for study. Involvement in one subject area often leads to interest in another and occasionally can lead to the formation of another study group:

*"I went for a French class but I have learned so much more, about language, about life. A great deal of what we learn is unplanned and incidental. We never know where our ideas will take us. We don't have to stick to a syllabus we can explore anything which takes our fancy. It's very liberating."* (Ruth)

Involvement in U3A varied from heavy commitment (Mary and Ruth), to attendance at only one or two groups and the monthly meeting, which is usually a lecture, followed by opportunities for socialising. Other commitments, either family or voluntary work, were given as reasons for limiting involvement.

Mary is a member of the management committee, attends two groups, and facilitates three groups:

*"I did not intend to become so involved. I was just going to attend a couple of groups, but gradually I was drawn in. It has been a wonderful experience. Leading the language groups has been one of the most rewarding things I have done. I spent 30 years battling with adolescents, but these people are sheer joy"*.

Mary's perspective as a group leader is of interest in pedagogical terms. She told how teaching this age group requires a different mindset from teaching in school. The pressures are off; there are no deadlines to be met. The only outcomes required are that people go away feeling that they have progressed and that above all it was a pleasurable experience. Learning as leisure is a liberating experience both for the students and the facilitator and a vital factor in the maintenance of self-identity. The group can follow whatever aspects of the subject they find most interesting. The students set their own targets and enjoy the challenge of determining the curriculum. They are not simply exploring new knowledge but also learning about themselves. Older people are far more

reflective about the learning process than children. They have the advantage of a lifetime of learning experiences and possess the tools that enable them to discuss and describe how they learn.

Most interviewees admitted that their commitment to learning is not constant. When learning is a leisure activity other events will take precedence: theatre visits, holidays, hospital appointments. Older people are frequently carers in the widest sense. It is not unusual for the “young elderly” to be juggling attending to a sick partner, caring for a frail elderly parent and stepping in to look after grandchildren in times of family crisis. This generation of sixty to eighty year-olds is proving to be very adaptable and flexible. Half of those sampled were grandparents. They welcomed the involvement with grandchildren as yet another learning experience.

To summarise the third age learning experience and its importance in the lives of these older people:

- Learning is but one activity amongst many others. The stated motivation for involvement in learning is to keep an active and enquiring mind, to develop new interests and to revisit old ones. The sub text is the desire to maintain and develop social contacts. The ageing process cannot be prevented, but successful ageing, the ability to adapt to old age, can be aided by maintaining interactions and transactions within the cultural environment (Baltes and Graf 1996). The cases in this sample are involved in many activities in the community, but learning in this particular context provides access to social interaction the need for which they seem to understand instinctively. They recognise the importance of remaining involved in social and cultural life and of avoiding the drift towards disengagement (Jarvis 2001).
- The subject being studied is only part of the transaction, the opportunity for dialogue being of equal importance. Previous learning experiences in a formal context had been seen as inhibiting and not conducive to discussion



and the development of relationships. The dynamics of group interaction, where learning is turned into a co-operative action, take away the pressure on the individual to achieve. The participants are mutually responsible for each other's learning. Learning with one's peers, and where the facilitator is also a member of that group, avoids the teacher/pupil relationship that may have marred learning experiences in the past. There is a sense of security when learning with people with whom one feels equal, who have shared similar life events.

- Students are free to negotiate the curriculum and take charge of their own learning. This can be a liberating experience, enhancing self-esteem and improving confidence. There is also the opportunity to reflect upon the process of learning and to become aware of one's own approach to learning. Such self-awareness often generates an understanding of subjects previously thought inaccessible. Through its activities the U3A is bringing to life the vision of Glendenning (1991) for the future of critical educational gerontology: older adults are in control of their thinking and learning, and have the possibility for further development, thinking, questioning and reflecting upon what they know or on new areas of knowledge.
- The ethos of the organisation is probably more important than the chosen subject. Choices are often made on the basis of convenience of time or location but the chief motivation is to experience a sense of belonging. The decision to attend a given class is being used as a means of admission to a social group. Members who feel ill at ease in a particular group tend to drift away and seek out other groups and different subjects. The essential is being with other like-minded people; the opportunity to learn is a bonus.

## 5. DISCUSSION AND CONCLUSIONS

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A life history approach was chosen for this research compiling lifetime learning profiles of twelve older adults. Using these profiles it was possible to identify factors that may have led them to become learners in later life. The interviewees were selected on the basis of age cohorts in order to establish if there were historical time related determinants of participation behaviour and to detect any culture shifts relating to what was appropriate to a particular social group at a particular time.

The Finnish study (Antikainen et al 1996) had covered three generations with an age difference of 40 years between the oldest and the youngest. It had compared pre-war and post-war generations and was able to demonstrate how the values and meanings given to education differed for each age group. It had also shown that participation and non-participation were strongly linked to the opportunity structures available to individuals and to their personal disposition towards those structures. In this study the four cohorts were much narrower, with only 19 years between the oldest and the youngest respondent. The variations in the values and meanings attributed to education between the cohorts were in some areas only slight. Nevertheless the stories demonstrated that decisions to participate were largely determined by the cultural resources available at any given time and by the tendency to conform to the cultural norms of one's cohort. Differences between the cohorts were most apparent when comparing the youngest with the oldest. This was especially true with the attitudes and expectations of women as they left school, the younger ones seeking to combine career with marriage, the oldest ones expecting to devote their lives to husband and children. The way women viewed their role in life was observed to change over a relatively short time-span.

The experiences of these third-agers were very similar to those of Antikainen's oldest cohort, insofar as their opportunities for participation in formal education were limited. However, as Tikkanen (1998) and Gorard et al (1999) have noted,

school-based qualifications are not especially significant in determining future learning activities especially for this older age group. Rather it is life experiences and changing opportunities that provide the impetus. In attempting to understand the processes of participation in learning it is important to look at the relationship between individuals and society, at the cultural influences and the opportunity structures available to them. The life history approach was an effective tool for investigating the social and cultural structures of the middle years of the twentieth century. The stories of the twelve interviewees gave an insight into the era during which they constructed their lives and an indication of how people managed and adapted to change. The voices were individual yet they illustrated the connections between biography, history and social structure. There were pressures to conform to the cultural norms but we also saw the effects of personal disposition and the family situation. Participant behaviour is frequently specific to particular historic circumstances. We saw differing responses, largely determined by age, to disruption of education in wartime and to the learning opportunities that arose as a consequence of wartime experiences. The depressed economy of the 1930's drove young people into early employment and highlighted the importance of perfecting work related skills, whereas post-war economic expansion brought improved job prospects and generated opportunities for leisure time learning and self development. More recently, moves towards vocationalism and the ensuing loss of much general/liberal education for adults have pushed those seeking life-enhancing learning experiences towards non-formal, self-help organisations.

With the exception of the market trader, all members of the sample could be described as having a learning attitude to life and as having left school with their intellectual curiosity awakened. Learning was accepted as a normal part of their lives whether it be learning as leisure, learning skills when the need arose or learning through experience. The post war period saw growing prosperity, increasing social mobility and an expansion of adult education. Members of all cohorts were able to benefit from these changes although only one interviewee had embarked upon a sustained formal learning programme. Most post-school learning occurred in the work place or through daily life, acquiring skills as and when required. Attitudes to formal study were largely negative. It was

undertaken only when it was seen to be beneficial in terms of improving performance at work, increasing job security or, where the nature of the employment demanded it. In most cases there was little formal learning once maturity was reached.

Antikainen (1998) claimed to detect an idealisation of education amongst older people whose initial education had been short. This was not evident in my sample, except perhaps in the case of the two women whose education was disrupted by war. Feeling that their education had been cut short, they both set out to pursue learning in their adult life. They appeared to place great value on acquiring knowledge to compensate for what they believed they had missed. The rest held a pragmatic view of the education they had received: school had given them the tools for learning, a vital resource; how they used those tools depended upon their own personal circumstances and their motivations. The younger cohorts, educated during the war, were more critical of their initial education, but it was frequently emphasised, across all cohorts, that learning only begins when you move into the 'real' adult world.

Antikainen (1998), following Alheit (1994), argued that life experiences are the very foundations of educative processes. Confirming the tenets of life transition theory, he identified significant events that act as triggers for learning: new employment, marriage, the arrival of children, changed location or bereavement. The interviewees in this study recognised that such events demand life adjustments and the acquisition of new skills, although they did not spontaneously identify these episodes as learning experiences. They were simply getting on with life, adapting to the social situations in which they found themselves. In the terms of Giddens (1990) they were transforming lifetime experiences into knowledge, skills, values and beliefs. In addition they acknowledged significant others: teachers, friends, and partners who had influenced learning habits, introducing new interests, leisure time learning and a consequent expansion of cultural understanding. Negative influences were also evident in the cautious restraints imposed by parents, guiding children towards work rather than continuing in education.

Jarvis (2001) describes transition as a period when individuals learn to play new roles attached to their changed status in society. This is especially true of the move into retirement where retirees are required to learn a new identity and to establish a different life pattern. Attitudes to retirement were similar across all the cohorts and were related to gender rather than to a particular age group. Women in the sample moved easily into retirement whereas men took longer to adjust to a new way of life and had to learn to retire. Retirement was seen as a positive move, mirroring the patterns of retirement expectation identified by Gee and Baillie (1999): a new phase in life, a time of freedom to tackle long awaited goals and to take up new interests. No one spoke of disengagement from life but perhaps the insistence on keeping active both mentally and physically should be seen as an avoidance technique, a refusal to accept the ageing process. All mentioned developing new interests and making new friends. Remaining involved as volunteers, as gardeners, travelling, indulging in sport and leisure activities could all be perceived as means of delaying disengagement for as long as possible. There appears to be an instinctive concurrence with the concept promulgated by Baltes and Graf (1996) that ageing successfully is dependent upon maintaining interactions and transactions within the cultural environment.

Attention has already been drawn to the link between social activism and participation in learning (McGivney 1990, Benn 1997). Social participation theory posits the belief that those involved in a range of activities in the community are the most likely to participate in learning activities. All the interviewees in this study are active in local organisations and 80% of the respondents to the questionnaire are so involved. There seems to be a learning spin off from such membership. Not only are these organisations a source of learning but they also give access to information networks and to social strata where learning is the norm. Most introductions to the U3A are through contacts with others who are already members and it seems that typical participants are 'social beings', involved in a wide range of activities of which learning is but one.

Emerging from this study is the concept of third-age learning as a predominately social activity where the subject being studied is of secondary importance. Data

from the questionnaire indicated that 75% of the members had joined the U3A for social reasons. Research by Walker (1998) for the Older and Bolder project, produced similar findings. An engagement to study acts as an entrée to the social interaction which these people value. There are also pragmatic reasons influencing the choices people make. Low costs of classes, ease of access and daytime programmes were all given as reasons for joining the U3A rather than other educational organisations. However learning is not the only activity in the lives of these retirees and does not take first priority.

Social participation theory links into reference group theory which suggests that individuals identify with the social and cultural group to which they belong (Gooderham, cited in Benn 1997). People tend to behave in the manner of those with whom they associate. If friends and acquaintances are involved in learning activities there will be a positive impulse to do likewise. The subjects in this study would describe themselves as members of the middle class with working class origins. They have had shared life experiences during a particular historical period and now enjoy spending time with 'like-minded people'. There are negative implications arising from this theory: organisations like the U3A risk becoming exclusive clubs that unwittingly erect barriers to other social groupings and serve only their own kind.

Life transition theory suggests that the move to retirement involves learning a new role: how is one expected to behave in retirement? The prospect of perhaps twenty years of active life post-work is a relatively new phenomenon. Today's third-agers have no role models to follow; most of their parents having died soon after retirement. Longevity and improved health are leading to a re-shaping of the experience of retirement wherein the negative images of aging are being contested. The entire sample is using learning as part of their strategy in creating a new pattern of life. This is especially true of the recently bereaved or for those finding the transition to retirement difficult. Their activities provide evidence of the emergence of a third- age culture which can challenge the ageist attitudes that permeate much of the thinking around old age. The people in this study do not fit the stereotype of decline and dependency. They do not see themselves as disadvantaged by age and indicate a determination to remain in control of their

lives. An active retirement is regarded as being the norm in the social environment in which they move. The youngest retirees especially had approached retirement as a time for self-fulfilment; 'at last it is time for me'. McKie (1999) welcomes the promotion of leisure pursuits, including learning, as an appropriate part of retirement life-style. She believes that we are moving away from previous stereotypes of ageing towards a culture where it is acceptable for older people to indulge in activities that were once the preserve of the young.

The interviewees spoke of the importance of remaining mentally active and believed that participation in learning is a means of doing so. No one referred to the health aspects of learning. Government reports (Dench and Regan 2000) and policy documents (DfEE1999) are beginning to promote the concept of involvement in learning as a route to improved health. The evidence however is anecdotal and controlled scientific testing of such claims would be difficult to administer. Educational gerontologists are devising mental fitness programmes, claiming that mental fitness empowers the elderly (Cusack 1999). This approach seems restrictive. Mental aerobics may be fun but a game of Bridge or Scrabble would have the additional advantage of furthering social contact. To present learning as therapy may re-enforce the view of old age as a period of dependency, requiring protection and support. A curriculum designed specifically for older learners suggests a form of social control. Gaskell (2002) goes so far as to suggest that pedagogic practices within health/welfare provision serve only to infantilise older people, leading to their disempowerment.

Empowerment, in the sense of generating confidence, comes from allowing people of any age to take charge of their own intellectual activities. The U3A members gain confidence from the fact that they create the curriculum and are able to modify and change it according to their interests. Their learning is rooted in the social and cultural characteristics of their generation and not imposed by educationalists whose understanding of older people may come from the standpoint of a young researcher/practitioner. The interviewees spoke of enjoying a sense of equality with their fellow students and of cherishing their independence from local welfare provision.

### **The value of life histories**

West (2000) states that much of his research is driven by the question: why are some individuals, more than others, able to transcend the constraints of a particular culture or situation? The life history can move us towards an understanding of the motivations that drive people to continue learning but I felt that I was only beginning to scratch the surface of these stories. Why have these interviewees and their fellow members of the U3A chosen to learn in later life, when the majority of their generation have not? Many hours of conversation are needed to penetrate the deeper meanings attributed to learning by men and women but time and resources were not available for such in depth study. The use of age cohorts to examine learning habits was not as useful as anticipated and perhaps diverted me from some of the main issues. Too much attention was given to looking for differences in lifetime experiences across the cohorts, whereas it would have been more productive to explore more deeply the experiences of learning in retirement. Examining the differences between the cohorts produced copious data, but ultimately it did not add substantially to the understanding of the retirement experience. I had expected that the different generational groupings would have displayed more diversity of attitude towards participation but this was not the case. What emerged was a surprising uniformity of reaction to learning opportunities. Across all cohorts decisions to participate were influenced by personal disposition and family situation but especially by the impact of economic, social and historic events. There was much adherence to the cultural norms and it would seem that we all function within the structures and according to the mores of the era in which we operate (Alheit 1994).

The use of cohorts was effective in tracking the changing role of women and their attitude to life and learning from the 1920's onwards. The oldest women who started work in the 1930's saw themselves destined to marry and become housewife and mother. They accepted that domestic role happily and their learning was mostly directed towards fulfilling it. Employment would occupy the time between leaving school and marriage after which learning would mostly arise from the needs of home and family. The war brought many changes. The early seeds of feminism could be detected during the war years. Women were



drafted into the work force, often taking on work traditionally performed by men. They found themselves in sole charge of home and children. The end of the war saw some women reluctant to exchange the work place for the domestic scene. The returning fathers sometimes found their previously dominant role as head of the household diminished. By the late 1940's the members of the younger cohorts were beginning to question the domestic role assigned to them and could appreciate the value of continuing in formal education. The youngest women were also critical of the education they had received during the war, being aware of its shortcomings. We see women beginning to think in terms of a career rather than a job with which to fill the gap until marriage, with the possibility of picking up that career at a later stage. The younger women were looking for training for work, although it did not always materialise. The older women never expected training and had accepted the domestic role without question. There was however a strong pull towards maintenance of the traditional cultural norms. The youngest women at school leaving age often found their ambitions constrained by the wishes of parents, not yet ready for the duality of women's lives. Eventually the three oldest women spent their lives at home; all the rest combined marriage and career. In this situation the use of age cohorts revealed very different attitudes to marriage and career between the oldest and the youngest cohorts, the younger women being most affected by the feminist movement.

It was not clear how the men in the study regarded the changed role of women. West (1996 & 2000) noted that men reveal less of themselves in interviews and have difficulty in handling the emotional aspects of changing roles. It would perhaps have been instructive to interview some 'young-old' men and to attempt to ascertain if they are aware of a changed role for men. Have they come to terms with feminism?

The stories told were of individuals but they reflected the developments in the wider society illustrating the impact of historical, economic and social events. Looking at experiences across the cohorts it was evident that the age at which particular events were confronted was significant. Those entering the workforce during the economic depression were aware of pressures to earn a good wage in

a secure job so as to ease the family financial burdens. Children caught up in the war were powerless to control their situation yet had to adapt in some cases to traumatic events, whereas those who were already adult during the war were sometimes able to turn adversity to advantage. Here it is possible to talk about people sharing 'time-space' (Laslett cited by Gaskell, T. 1999), and having a collective generational self-image. The children who were at school during the war years have shared memories of those times, very different from those of the cohorts before them who experienced the war as adults. The oldest cohort's experience of marriage in the 1940's and 1950's was unlike that of the post war generation, marrying during the 1960's and dealing with the tensions of combining career and family. Nevertheless attitudes to learning were not radically different. Those with a learning approach to life appear to seek out learning opportunities, utilising whatever resources are available to them at any given time.

Being an insider was an advantage in this research. A relationship was quickly established with the interviewees who were prepared to speak frankly because we had a shared history and shared experiences. Explanations were unnecessary as I had been there and we were collaborating in telling our stories. Conversely, objectivity was difficult and I frequently found myself being drawn into the other person's life history. In observing and recording the behaviour of the storytellers, I was obliged to confront my own story. It was a two way process and we were learning from each other:

If the research involved my collaborators asking questions about gender, biographical processes and learning in their lives, I was asking questions in mine too. (West 2000 p.4)

For most of the interviewees this was the first time they had found an occasion to consider the progress of their lives and to reflect upon their life course. Some of the stories were painful to recount, yet most interviewees found the experience helpful in understanding the journey that has been their life. Ultimately the stories were more important than the concepts that they illustrate. Life history and reminiscence become important in later life allowing people to

reflect upon the significance of events and their relationship to them. It is imperative, however, that those acting as facilitators approach the task with sensitivity. Several felt it would be useful to attempt to write or to record their life story and it was suggested that an oral history group could be formed.

What picture of third age learners has emerged?

Firstly the stereotypical image of old people as non-participants in learning has been challenged. This imagery stems from research, documented by McGivney (1990), where participation surveys were predominantly about the take-up of formal education by people of working age. Consequently older people rarely figure as participants and it is only in recent years that surveys have begun of areas where older learners are likely to be found. These people, whose learning life histories were examined, represent an enthusiastic group of members of the U3A ranging in age from 67 to 87. They are not typical of the general pensioner population but they are typical of the membership of their organisation. They are among those who join organisations, be it churches, clubs or libraries. They tend to be involved in a wide range of activities in the community and many are also carers. Such social activism gives access to local information leading to awareness of learning opportunities. We are seeing a participant personality that thrives on involvement. These are the older people whom Jarvis (2001) describes as 'doers', perpetually busy with a wide variety of leisure pursuits, voluntary work, running organisations. They are also the 'sages' for whom life is still an intellectual adventure and who are now free to learn whatever takes their interest. They are not just participants in learning but also participants in life.

Secondly it has been demonstrated that in the case of these particular interviewees limited initial education was not a barrier to subsequent participation in learning. Early leaving was normal for the majority of the population until the second half of the twentieth century; the school leaving age was not raised to 15 until 1948. Two-thirds of this sample did not continue in school beyond the statutory age but their experiences of school were largely positive. It is more likely that poor experiences in early education will lead to non-participation. If schooling generates negative feelings and is associated with non-achievement, there is little incentive to repeat the experience. The market

trader interviewed was eager to leave school, feeling it had no relevance to the life he was leading. The rest of the group had positive feelings about their school experience. Most of them had not been subjected to a rigorous examination regime so had not experienced academic failure. Their formal education, though short had acted as a springboard for learning throughout life.

Thirdly the notion that older people are not interested in or are incapable of learning has been proved invalid. Current expectations of old age have been informed by ageist stereotypes which portray ageing as a descent into illness, helplessness and dependence. Assuming heterogeneity amongst older people and seeing them as uniformly disadvantaged, educational gerontologists have tended to develop programmes of education that could be termed interventionist. Often part of welfare provision such programmes aim to keep older people occupied and help them to cope with descent into senility. There is a failure to recognise that those suffering acute or chronic illness or dementia are a minority and that the majority of older people are fit and active. The interviewees are proof that the mind does not necessarily cease to function when individuals retire from work. They have maintained their intellectual curiosity and are excited by the possibilities of exploring new ideas and revisiting old interests. They are proving to be capable of coming to grips with new knowledge and its accompanying technology. They are not yet ready to follow the path of disengagement.

What is the nature of third age learning and what purpose does it serve?

Although third-age learning is being pursued in many contexts, this study has concerned itself with the U3A. Jarvis (2001) describes the U3A as a learning network but considers that its non-formal approach to learning may be a reflection of the kind of leisure time learning that to-day's third-agers followed at earlier stages in their lives. He suggests that the organisation has emerged from the liberal tradition of learning that was popular in the 1960's and 1970's. The present rise in interest in third age learning could be merely a reflection of the interests pursued by this generation of third agers some thirty or forty years ago. Certainly the interviewees had in the past engaged in leisure time learning in adult education classes, but they did not find the U3A experience comparable. Adult education was perceived as formal and hierarchical and not always suited

to the kind of learning experience they were seeking. In some cases they had felt they were under pressure to achieve. Are we seeing a reinvention of the non-vocational education of the past or is third age learning a new educational phenomenon? When this proposition was put to the interviewees they opted for the new educational phenomenon. Jarvis has not appreciated that it is the non-formal self-help ethos of the organisation, with its opportunities for social interaction, which attracts these older learners.

Can we account for the success of the U3A?

It seems that the U3A approach to learning is one with which older people feel at ease, from which they believe they are benefiting and which fits comfortably with their life style. The strength of the movement lies in its organising from the grass roots. There are no hierarchical structures and learners are spared the hegemony of the teacher and student relationship. Individual groups negotiate and develop their own curriculum based on identified needs and interests. Members are determining what they learn and how they learn it. Gaskell, T. (1999) observed that co-operative and self-help learning groups form an interesting bridge between the formal and the informal. There is a tendency to reject formal methods but if an existing course is found to be suitable then it will be used and adapted to suit the group. Learning is believed to be a means of maintaining mental activity but the opportunity to socialise is an important element for most members. The most successful groups are those where there is mutual peer support generating the development of group cohesion. Learning and knowledge are generated by social interaction. Much of the learning is fun and could be described as learning by stealth. There is no pressure to be the best student. The dynamics of collaborative group learning put the learner at the centre of the learning experience and give a voice to those learners. It would seem that for this age group, some of whom may find formal hierarchical structures intimidating, the social context is conducive to learning.

Formosa (2000) concluded that the top down model of education is not in the best interests of older learners. His studies indicated that they felt patronised by young lecturers who delivered packaged knowledge and failed to recognise the diversity of the life experiences of older students. He joins Glendenning (1997)

and Withnall (2000) in questioning some current gerogological practices and calls for a new paradigm within critical educational gerontology, which can lead older people to take charge of their lives and be responsible for their own learning.

Terms such as pedagogy and gerogogy – strategies for teaching older adults - are not applicable to the third age learning situation. They imply hierarchical structures designed to impart a pre-determined body of knowledge by a practitioner whose ideological stance may be suspect. These older learners in the U3A have dispensed with the hierarchy and have taken on the dual role of teacher and student. Jerome Bruner advises: ‘learning is best when it is participatory, proactive, communal, collaborative, and given over to constructing meanings rather than receiving them’ (1996, p.84). This is an apt description of the U3A experience with its emphasis on self-help, equality and co-operation

Where does the U3A position itself within the learning society?

Alheit (1999), drawing upon Edwards (1995), signals the development of open learning networks where those who have moved away from public provision can pursue their learning interests autonomously. Here we have people with a learning approach to life, meeting together in a learning environment, developing their interests and enriching their personal identities as part of leisure activity. Surely the U3A can be counted as one small part of the third strand in Edwards’ banner? Open learning networks of this kind are able to foster a wide range of skills and interests, which would probably not be viable in the formal state funded system. They provide space for ‘seriously useless learning’ (Tuckett 2001). In a sense we are seeing a challenge to state sponsored “official knowledge”. Learning autonomously, students are able to determine what is valid knowledge, relevant to their needs and interests. Such a move, away from system-controlled education towards student-controlled learning, has implications for education policy makers. Can justification be found for investing some part of taxpayers’ money on learning projects outside government control?

Government policy statements (*Learning to Succeed* DfEE 1999) have moved towards acknowledging a role for community based learning and have promised help with resources. Allocation of such resources may present a problem. How does a funding authority decide which groups are worthy of support? Funding is normally dependent upon favourable assessment. As yet there are no agreed criteria for evaluating informal learning. In addition help tends to go to those who are most able articulate their case. Once funding is in place an organisation becomes accountable to the funding authority thus jeopardising the autonomy that is a feature of its *raison d'être*.

### **Implications for future research and practice**

This study was narrow in its scope and has only scratched the surface of the field of learning in later life, a field that is rich for exploration. It was limited to a small number of individuals, members of a mainly middle class organisation, with its own distinctive self help ethos. Nevertheless the findings have implications for future research and practice.

- This study perhaps placed too much emphasis on learning histories at the expense of current learning activities. More attention should have been paid to current motivations to learn and to the value that older people place upon their learning. Further research is called for into the meanings given to current learning experiences by a more diverse range of older learners than this study was able to undertake. Older learners are studying in a variety of contexts of which the U3A represents only a small sector.
- Given that the life history approach is time consuming, a different approach to data collection might be considered. Older people themselves can be brought into the research process. Groups of older people, drawn from a range of learning contexts, could be guided towards examining their experiences of learning in later life. Those interviewed in this study displayed insight and understanding into the way of life of their peers. They were especially interested in forming an oral history group to consider changes in the field of education during their lifetime. Given some training, many third-agers would

be capable of undertaking small-scale localised studies that could form part of a larger national research project. Commenting on work in Massachusetts, Bass and Caro (1995) indicated that the elderly could help project leaders understand the field more fully. They are able to share their experiences and are often able to get richer data from older respondents.

- Is there a role for Government in encouraging third age participation in learning? Should this input be within education programme or as a function of health and welfare policies? Organisations such as the U3A thrive because they cherish their independence, yet they would welcome support and acknowledgement of their contribution to the enrichment of the experience of retirement. Funding could be in the form of subsidised accommodation, free access to computers and the Internet, help in hiring equipment; but there must be no strings attached. Governmental input should be supportive but not prescriptive. Funding authorities must find the courage to trust those whom they help, allowing them space to develop their own approach to learning and to decide what constitutes valid knowledge.
- The nature of third-age learning and the learning styles of older people are not fully understood. Some, a minority, will opt for the formal education route but for the majority the traditional didactic pedagogy appears inappropriate and may even act as a deterrent. Older learners can bring the benefits of lifetime experiences to their learning and those who plan programmes of study should acknowledge this. The informal, self- help, collaborative, participatory learning which is a feature of groups in the U3A is worthy of study. Systematic observation of third age learning in action could provide an insight into the functioning of non-formal learning groups and try to account for their appeal to older learners. What are older people learning and why? How are they learning? What criteria can be used to assess older people's learning? Is progression important? Do targets help or deter?
- Practitioners in the field of educational gerontology could perhaps consider the U3A model that puts people in charge of their own learning. Much of the



provision, in the guise of therapeutic education, stems from a deficit model of older adults' learning abilities. Claiming to empower older people it only serves to reinforce ageist attitudes. Many, perhaps the majority, of older people are capable of organising their own learning activities and do not deserve provision which reinforces dependency. Day centres for the elderly already provide a social context within which it would be possible to develop stimulating learning experiences that emerge from the interests of the members. Providers need to consult with older people and acknowledge the wisdom and insights accumulated during their lifespan. Putting people in control of their own thinking and learning and giving them the opportunity to reflect upon their life experiences sets them on the road to emancipation. This could be the route to delay dependency.

- The U3A model could be a starting point for other schemes. The complexes of retirement homes being built throughout the country could be developed as centres of third age learning. Library spaces and Internet connection could be incorporated at the building stage. Facilitators could work with residents to set up learning groups.
- The way in which retirement is experienced is changing rapidly. For some it may last as long as thirty years, almost as long as their working life. How will those years be filled? Sociologists detect the development of a third-age culture, a third age-life style. Phillipson (1998) claims that later life is being reconstructed as a period of choice and opportunity where consumerism can offer a multiplicity of leisure activities. Gaskell (2002) has suggested that as people age the values and morality of their cohort stay with them. However we do not stand still. New knowledge forces us to become learners; social changes propel us in to experiences we could not have envisaged thirty years ago. A third age culture is evolving, in which learning can play a strong role. We have studies of youth culture and women's studies. The time is propitious for research which examines the developing culture of the third age.

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# Appendix I

# Questionnaire

Membership no..... Gender..... Date of birth .....

At what age did you cease full-time education?.....

Previous occupation before retirement.....

Why did you join U3A?.....

.....

How did you find out about it?

.....

Which study groups do you attend?.....

.....

List any new subjects in which you would like to have a study group.

.....

Do you attend other classes (eg WEA, Local Authority etc)? Please specify.....

If you have attended such classes in the past please explain why you no longer do so

.....

Do you regard U3A as:            a social group  
   an educational group            [tick only one]  
   a combination of both

In what other organisations or activities do you participate? .....

.....

### **Cohort 1 Born pre-1920**

**Emmy** born in Germany in 1915. Left school aged 15. Worked as nursing auxiliary. No formal training. Came as a refugee to Britain in 1938, aged 23. Worked in domestic service, where she learned English from her employer. A few formal English lessons. Married age 30 and became full time housewife and mother, also cared for her parents. Has no formal qualifications but has always been involved in learning activities, both formal and informal. Her latest course at the age of 86, is in word processing.

**Joan** born 1916. Left school at 14. Parents paid for a short commercial course. No formal qualifications. Never attended evening classes or day release in the post school years. Worked as clerical assistant throughout the war. Married at the age of thirty and became fulltime housewife and mother as well as caring for sister's children and elderly relatives. Self-taught in many crafts and domestic skills. Studied French formally when her children were in school and later added Italian. Trained as a bereavement counsellor in her sixties.

**Bill** born 1916. Husband of Joan. Left school at 18. Very positive experience of primary school. Passed the entrance exam to grammar school but parents could not afford the fees. Studied in the academic stream of a central school but failed to achieve sufficient formal qualifications to proceed to higher education. Worked as a lab assistant in the photographic department of a polytechnic college where he was allowed to sit in on lectures. Wartime service built upon his experience of x-ray film development. Post war, spent all his working life with Kodak, selling x-ray equipment to hospitals. Self-taught in many craft skills. Attended a wide range of adult education classes in arts and humanities subjects, also study groups organised by the church.

## **Cohort 2 born 1920-1929**

**Henry** born 1923. Left school at 14. Extremely poor home background; father a gambler and money was always short. Enjoyed school but truanted frequently in order to earn money to help with family finances. Left school at the earliest possible moment and worked with his uncle as a market trader. Apart from war service spent all his working life as a street trader, at which he was sufficiently successful to pay for private education for his children. No time for learning activities whilst working, but after heart surgery and enforced retirement he was persuaded by his wife to join U3A.

**Sidney** born 1923. Left school at 14 followed by two years in commercial college paid for by a scholarship. The youngest child of an immigrant family, all his siblings had started work at 14. Found employment with a shipping company in 1939. Studied subjects relevant to work in evening classes. The end of the war found him in Italy where he learned Italian whilst awaiting demobilisation. Returned to the same company and continued there until he set up his own import/export business. His wife introduced him to music, art and the theatre and together they attended many courses in those areas.

**Rosemary** born 1924. Left school at 14. Had enjoyed school, especially music. Would have liked a career as a singer, but her family could not afford fees for her to study music. Singing has remained a hobby throughout her life. She sang with several prestigious choirs and her knowledge of music is wide. Had learned typing at school and studied commercial subjects through day release and evening classes. She married in her mid-thirties and after a short break from work whilst her daughter was young, she returned to full time work. Attended evening classes in languages and craft subjects, but has no formal qualifications. She retired when computers were introduced to the work place, being unwilling to train in a new skill. Bereavement was the impetus for her to join U3A.

### **Cohort 3 born 1930 – 1931**

**Joyce** born 1930. Left school reluctantly at 14. Education severely disrupted by wartime evacuation and bombing. Estimates she was in twenty different schools and feels that she was deprived of education. She was to have studied textile design but a bomb destroyed the college, so she went directly into employment as a dressmaker. Studied design, pattern cutting and dressmaking in evening classes and went on to open her own business at the age of twenty-one. Married in her thirties, she became a fulltime housewife after the birth of her daughter. Always determined to make-up for her loss of schooling she embarked on a programme of self-education that continued throughout her life. She completed an access course in her fifties but did not have the confidence to follow through to a degree course. She regards all her learning as leisure activity and is reluctant to become involved in formal study.

**Ruth** born 1930. Left school reluctantly at 14. Had passed the grammar school entrance exam, but the separation of her parents led to her evacuation in order to ease the family situation. She was educated in a small country school, which she enjoyed, but at the age of 14 she returned to live with her father. She had hoped to follow a commercial course but her father insisted that she went to work in the family dressmaking business. She describes herself as completely self-taught, learning skills as she has needed them. She was ill-treated by her father and eventually ran away from home. After marriage she joined her husband in his business and taught herself the skills necessary for ordering goods and bookkeeping. Became interested in Jewish learning when her sons attended religion school, and has remained interested ever since. She is very committed to U3A, following a wide range of courses. Is also involved in voluntary work.

**Sheila** born 1931. Left school at 16. An only child from middle class home, was awarded a grammar school place but did not wish to be educated in a mixed school. Parents managed to find the fees for a small private school. At school during the war but feels she was protected from it. After School Certificate went to work in a library. Studied in evening classes to obtain qualification as a

librarian. After marriage she left work to look after two sons. Enjoyed family life but eventually returned to work part-time until retirement. Claims to have done very little learning since evening class studies, but this was not borne out by the interview.

#### **Cohort 4 Born 1933 – 1935**

The members of this cohort were the first to be affected by the introduction of the tri-partite secondary education system and the raising of the school leaving age to 15.

**Irene** born 1933. Left school at 15. Transferred to new Junior Technical School in 1945. Followed an art foundation course which could have led to formal examination at 16 but parents insisted she should leave school at the statutory leaving age. Does not think the war impacted on her primary education. She found work in the drawing office of an engineering firm. Studied mechanical engineering in evening classes and day release for six years. After marriage, she worked freelance from home. At the age of 40 she embarked on a career change and began teaching technical drawing, with no formal training. Finished her teaching career in charge of computer studies in a large comprehensive school.

**Mary** born 1934. Left school at 18, completed full time education at 24. Only child from a working class family. Changed schools several times during the war; always felt confused about basics. The first child in her neighbourhood to go to grammar school and then to university, she found school education stressful and feared she was cutting herself off from her roots. Spent all her working life in teaching, with a seven-year break whilst her sons were small. Heavily committed to U3A.

**Rita** born 1935. Left school at 15. At school during the war, but has no strong memory of wartime. Attended a secondary modern school, where she followed a commercial course. Youngest of three children all of whom went straight into work. Studied office practice in evening classes. Married in her early twenties,

and immigrated to Canada with her husband and three children. Learned French in Canada. Returned to UK after ten years. Still works part-time as a clerical assistant. Joined U3A to keep up her French conversation skills after the Local Authority class folded. No other Participation in U3A. Main interests are sports, keep-fit and voluntary work.