

**Perceptions of Learning and Education in
Later Life: prevailing discourse and
informing narratives**

Sheena E.E.Blair

A thesis submitted in partial fulfilment of the
requirements for the degree of Doctor of
Education

The University of Edinburgh

November 2005

Regulation 3.8.7

Declaration

- I have composed this thesis
- The thesis is my own work
- The thesis has not been submitted for any other degree or professional qualification except as specified

THE UNIVERSITY OF EDINBURGH

ABSTRACT OF THESIS

(Reg.
3.9.14)

Name of Candidate: Sheena E.E.Blair

Address :

Degree: Doctor of Education

Title of Thesis: Perceptions of Learning and Education in Later Life: prevailing discourse and informing narratives

No. of words in the main text of Thesis: 55,800

Lifelong learning raises expectations of a process that will endure over the life course. Economic and social benefits are believed to accrue for both the individual and society as a result. Older people constitute the fastest growing population in Scotland but acquiring knowledge and skills for employment may not be their priority. However, they have an investment in the social purposes of learning and education. Also, people who are aged fifty plus have learning and educational trajectories which may either encourage or dissuade them from engaging with learning opportunities in later life.

Research questions providing impetus for this work revolved around the impact of lifelong learning policy and meanings of learning and education for people in later life. The aim of this study was to explore the individual and collective perceptions of a small group of older people about the nature, purpose and meaning of learning and education.

A review of selected literature about the learning society, lifelong learning and associated social benefits revealed a hegemonic discourse of invisibility concerning older people. But a separate and parallel discourse of emancipation was evident within educational gerontology. Amongst the perceived benefits of learning in later life was increased participation in society and links with health.

This interpretative, dialogical study used critical hermeneutics to explore and locate participants' perceptions and meanings of learning and education against a background of historical and contextual social relations. Methods used included focus groups and in-depth topic-centred narrative interviews, alongside a process of constant reflexivity. A purposeful sample of nine participants was involved for the duration of one year.

Thematic analysis of findings from the focus groups produced collective themes of "exclusion", "taking stock" and "moving on". Similar analysis of interview transcripts plus Labovian analysis of selected narrative sequences revealed issues concerning identity with strong adherence to the values of lifelong learning. Dissonance was evident between political and personal narratives.

This study adds to knowledge about collaborative initiatives with older people. New findings include older people's perceptions about lifelong learning policy and how that plus learning and educational trajectories impact upon learning in later life. Innovative methods of collecting findings were used and the substantive collection of learning and educational narratives conveyed information about historical contexts and personal epiphanies about learning.

Suggestions for further work include exploring the relationship between learning and wellbeing, exploration of factors that transform entrenched themes about learning and education and inquiry into aspects that constrain or facilitate personal and collective agency in later life.

Dedication

This thesis is dedicated to my mother – Katherine Steven who died on 6th April 2004.

Acknowledgements

This thesis has been completed with the help and encouragement of numerous individuals. The source of the idea must be attributed to my involvement with the Royal Bank of Scotland Centre for the Older Person's Agenda. Staff from that Centre have provided information, access to databases, a venue to explore ideas and in particular the assistance from Fiona O'May who acted both as a scribe during the focus groups and as an independent analyst for focus groups.

It was through this Centre that I was able to access the nine participants who gave their time generously and provided not only the findings but also interest and encouragement for the thesis. I have learned and developed as a researcher from exploring and analysing their individual and collective learning and educational experiences.

Queen Margaret University College permitted time to complete the work but also enabled me to undertake the Ed D by providing financial help. In addition, people who work within the Subject Area of Occupational Therapy and Art Therapy were constantly supportive during the five years. Financially, the Elizabeth Casson Trust must also be acknowledged for contributing towards the costs of the fieldwork involved in the study.

Moira Findlay helped to transcribe seventeen hours of tape-recorded material from the nine interviews and three focus groups carefully, promptly and with constant good humour.

Neil Morris assisted many times when the intricacies of information technology defeated me.

All Ed D students who commenced the course in 2000 and subsequent cohorts must be warmly acknowledged for providing a sympathetic but intellectually rigorous audience for presentations of my work in progress over the last two years. Likewise, all staff involved with the course deserves my sincere thanks for their interest and commitment. In particular, I would like to thank Charles Anderson for help with the narrative element of the study.

My family and friends have endured my absence, divided attention and preoccupation for five years and I offer my grateful thanks.

Finally, I wish to record my sincere appreciation to Professor Lindsay Paterson who has been supervisor of this study over the past two years. He has helped me to constantly expose my ideas to intellectual scrutiny, introduced me to different literature and provided scholarly support. All of this was provided with encouragement and interest in the emerging ideas about learning and education in later life.

TABLES, FIGURES AND ABBREVIATIONS

	Page
TABLES	
Table 1 Philosophical and theoretical parameters of my study	39
Table 2 Means of ensuring trustworthiness and rigour	55
Table 3 Outline of focus groups and respective themes	59
Table 4 Naming the stories	79

FIGURES	
Figure 1 Design of the study and the sequence of events Dec 2003 – Jan 2005	48
Figure 2 Synthesis of findings	107

ABBREVIATIONS

ESRC Economic and Social Research Council

FG Focus Group

L Line as in lines within the transcript

NIACE National Institute of Adult and Continuing Education

P Participant

RBS Royal Bank of Scotland (used in RBS Centre for the Older Person's Agenda)

TALIS Third Age Learning International Studies

U3A University of the Third Age

GLOSSARY OF TERMS AND WORKING DEFINITIONS

Analytical Categories. Conceptual labels given to groups of concepts which I distilled from the transcripts (DePoy and Gitlin 1994, Holloway 1997)

Discourse. Is regarded as a “way of thinking, or “knowledges” about particular phenomena such as sex, race and the family [in this case, learners who are 65 and over] and how they reflect particular historical, political or moral positions. (Taylor and Smith 2000:203)

Education. Learning in formal situations (Jarvis 2001)

Fourth Age. The period of life from 75 onwards (Jarvis 2001)

Later Life. In this study refers to the period of life when people have retired from paid full time employment and are aged 65+

Learning. In this study it is considered to occur in informal, non-formal and formal situations (Jarvis 2001)

Narrative. Refers to “talk organised around consequential events” (Reissman 1993:3). In this case the topic centres around learning and education

Sub-themes. Clusters of linked categories, which coalesce in my interpretation to convey a similar meaning and form a unit

Story. Refers to the totality of the account that participants recounted

Themes. Relate to the overarching idea which the categories and the sub-themes support and represent a further abstraction to make sense of the material (DePoy and Gitlin 1994)

Third Age. The period of life from 50 to 75 (Jarvis (2001)

DEDICATION	I
ACKNOWLEDGEMENTS.....	II
TABLES, FIGURES AND ABBREVIATIONS	III
GLOSSARY OF TERMS AND WORKING DEFINITIONS.....	IV
CHAPTER 1: INTRODUCTION.....	1
SETTING THE SCENE.....	1
TRUSTEE OR EXPATRIATE?.....	2
LIFELONG LEARNING	4
SCOTTISH RESPONSES AND POSSIBILITIES	5
SOCIAL GERONTOLOGY.....	6
EDUCATIONAL GERONTOLOGY	7
PARAMETERS OF THE STUDY.....	7
RESEARCH QUESTIONS, AIMS AND OBJECTIVES	9
TERMINOLOGY AND THE ISSUE OF VOICE	10
THESIS STRUCTURE.....	10
CHAPTER 2: LITERATURE REVIEW - EVALUATING THE EXISTING CORPUS OF KNOWLEDGE.....	11
STRUCTURE AND AIMS OF THE REVIEW	11
MACRO INFLUENCES UPON LEARNING AND EDUCATION IN LATER LIFE: OR THE “NEEDLE IN THE HAYSTACK PHENOMENA”.....	11
ATTEMPTS TO LOCATE OLDER PEOPLE WITHIN LITERATURE EXTOLLING THE SOCIAL PURPOSE OF LEARNING AND EDUCATION	13
ISSUES ABOUT CITIZENSHIP.....	14
ARE OLDER PEOPLE PART OF THE LEARNING SOCIETY?.....	15
HUMAN CAPITAL OR SOCIAL CAPITAL?	18
MODEST EVIDENCE OF CHANGE IN THE LITERATURE.....	19
EDUCATIONAL GERONTOLOGY: A PARALLEL DISCOURSE?.....	23
DEBATES ABOUT PRACTICE.....	26
DEBATES ABOUT SOCIAL EQUITY	27
PARADIGM SHIFT	28
CLAIMS FOR THE BENEFITS OF LEARNING IN LATER LIFE: DISCOURSES ABOUT QUALITY OF LIFE	30
CHAPTER 3: METHODOLOGY - FRAMING THE PATHS, PROCEDURES AND PROCESSES OF THE STUDY	38
THEORETICAL BACKGROUND.....	38
CRITICAL HERMENEUTICS AS THE METHODOLOGY OF CHOICE	40
POSSIBLE ALTERNATIVES.....	41
MY BACKGROUND AND FACTORS WHICH INFLUENCED THE DESIGN AND EXECUTION OF THE STUDY.....	42
PARTICIPANTS IN THE STUDY	43
ETHICAL PROCESSES	45
PREPARATORY WORK	46
CONCEIVING THE DESIGN AND SEQUENCE OF THE RESEARCH	47
METHODS SELECTED TO GATHER FINDINGS	49
<i>Focus groups as a research method with older people</i>	49
<i>Narrative</i>	51
<i>Researcher reflexivity</i>	53
ANALYSIS OF FINDINGS.....	56
CHAPTER 4: FINDINGS - REPRESENTATION OF THE EXPERIENCE THROUGH GROUP, INDIVIDUAL AND PERSONAL PERSPECTIVES	58
SECTION I FINDINGS FROM FOCUS GROUPS.....	59
<i>Phase 1 First focus group meeting - group theme “exclusion”</i>	59

<i>Phase 2 Second focus group - group theme “taking stock”</i>	65
<i>Phase 3 Third focus group - group theme “moving on”</i>	71
SECTION 2 NARRATIVE ANALYSIS OF LEARNING AND EDUCATIONAL STORIES WITHIN THE NINE IN-DEPTH INTERVIEWS	78
<i>Selected narrative sequences using a Labovian analysis to illustrate personal evaluations (meanings) in each of the four themes</i>	80
SECTION 3 ANALYSIS OF THIS INTERPRETIVE RESEARCH PROCESS: RESONANCE AND DISSONANCE ..	97
<i>Group processes over the year</i>	97
<i>Individual processes</i>	102
<i>Synthesis of findings</i>	106
SECTION 4 LOCATING MYSELF WITHIN THIS RESEARCH PROCESS.....	109
<i>Selected issues related to personal reflexivity or “older people are still helping me”</i>	110
<i>Selected issues related to functional reflexivity or “the challenge of co-learning”</i>	112
<i>Selected issues related to disciplinary reflexivity or “theoretical challenges”</i>	115
CHAPTER 5: DISCUSSION OF FINDINGS	118
SECTION 1 IMPACT OF THE POLICY - PROMISES UNFULFILLED	119
<i>Discussion of possible underpinning theoretical ideas</i>	121
SECTION 2 THE MEANING OF LEARNING AND EDUCATION IN LATER LIFE, LEARNING IDENTITIES AND THE IDEA OF BEING A “WORK IN PROGRESS”	125
<i>Meaningful learning</i>	126
<i>Moving on</i>	127
<i>What is learning in later life for?</i>	128
<i>Learning identities</i>	128
<i>The future – the length of lifelong learning</i>	131
SECTION 3 DISCUSSION OF THE CONTRIBUTION, POTENTIAL TENSIONS AND LIMITATIONS OF THE STUDY	133
<i>Links with other work</i>	133
<i>Participants’ views of the process</i>	134
<i>Innovative methods</i>	134
<i>Potential tensions and limitations of the study</i>	136
<i>Summary of issues raised by the discussion</i>	140
CHAPTER 6: CONCLUSION TO THE STUDY	142
OVERVIEW OF THE ISSUES.....	142
PREVAILING TENSIONS.....	145
THE MEANING OF LEARNING FOR THE PEOPLE IN THIS STUDY	149
WHAT I HAVE LEARNED FROM THIS EXPERIENCE	149
DIRECTIONS FOR FUTURE WORK	150
LETTER ACCOMPANYING THE POSTSCRIPT	153
POSTSCRIPT	154
REFERENCES	158
APPENDIX 1 – INDIVIDUAL PROFILES OF THE NINE PARTICIPANTS COMPILED FROM THEIR NARRATIVE INTERVIEWS AND TRANSCRIPTS.....	181
APPENDIX 2 - COLLECTIVE PROFILE OF THE NINE PARTICIPANTS IN THE STUDY	186
APPENDIX 3 - ANALYSIS OF MEMBER CHECKING PROCESS: “PUTTING THE RECORD STRAIGHT”	187
APPENDIX 4 - AUDIT TRAIL CONCERNING MY ANALYTICAL PROCESSING OF THE FOCUS GROUPS, NARRATIVE INTERVIEWS AND REFLECTIVE DIARY	189

APPENDIX 5 - EXAMPLE OF HOW ANALYTICAL CATEGORIES WERE MERGED INTO SUB-THEMES AND EVENTUALLY INTO THE OVERARCHING GROUP THEME..... 193

APPENDIX 6 - SELECTED EXAMPLES OF HOW ANALYTICAL CATEGORIES FROM THE NARRATIVE INTERVIEWS WERE MERGED INTO A THEME 195

APPENDIX 7 – ELEMENTS WITHIN THE NARRATIVE STRUCTURE..... 196

Chapter 1: Introduction

“The elderly of any society can be said to be trustees for the future” Laslett (1989:196)

Setting the scene

This quote from Laslett, a central figure in third age education, is used to introduce a key idea in the thesis which is that meanings are constantly changing and must be understood within cultural and historical contexts. While I endorse the sentiment extolling the reciprocal contribution that older people can make to society, the statement needs further analysis. Use of the term “the elderly” is now considered part of a socially exclusive discourse. Over the last decade, rapid social change and a political remit to reduce social exclusion have focused attention on the potential inclusivity or exclusivity of language. Now, the preferred term in the United Kingdom for people in later life is “older people”. This semantic shift reflects the principles of social inclusion in action and reveals language as an important social determinant. Nevertheless, demarcation of later life remains a complex social construction fraught with semantic, cultural, economic and practical connotations.

Lifelong learning endorses the vision and goals of social inclusion. Its purpose is to encourage learning across the lifespan that is valuable to both citizen and society (Field and Leicester 2000). As such, it is considered to be located within a vision of the learning society. Both concepts are heralded as egalitarian and inclusive. However, Walker (2000) noted that older people were a serious omission from both educational policy and practice. In the same year though, the National Institute of Adult Continuing Education (NIACE) perceived a shift in social policy initiatives towards more direct involvement of older people. Given that lifelong learning had been a feature in educational gerontology literature since Glendenning and Jones (1976) and there was new policy in Scotland, the climate seemed opportune to explore whether lifelong learning had impacted upon the lives of older people.

This introduction establishes the key ideas and parameters for the thesis. Research questions, aims for the study and associated objectives are provided together with details of how the work proceeds. The thesis explored individual and collective perceptions about learning and education held by a small group of older people. The dual focus for those perceptions was the summary version of the Scottish

Executive lifelong learning policy, *Life Through Learning Through Life* (2003) and their own learning and educational stories. This policy is part of a five-year strategy for lifelong learning in Scotland and it builds upon policies instigated prior to devolution. In particular, it sought to respond to evidence from the Enterprise and Lifelong Learning Committee Inquiry into lifelong learning in Scotland and contemporary developments in lifelong learning. The main policy document outlines in detail the history, context, and vision for lifelong learning in Scotland plus issues about implementation and evaluation. The shortened version consists of a large newsprint size document folded into sections that summarises the key points, goals, the implementation strategy and how success will be measured.

To access collective views from the same group of people about unfolding issues in the experience, I held three focus group meetings, bounded by briefing and debriefing events. Topic-centred narrative interviews concerning learning and education across the life course occurred between April and July 2004. Together with my own critical reflection on the process, I attempted to juxtapose personal meanings concerning learning and education in later life with contemporary political intent.

Trustee or expatriate?

We live in a society where the population balance is rapidly altering. 42% of the Scottish population will be over fifty by 2022 (Scottish Executive 2003). This has implications for resources, policies and practices. Demographic shifts such as this raise consciousness at successive levels. With the prospect of thirty to forty years of retirement to consider, governments and individual citizens are interested in quality of life issues and what has become known as successful ageing (Rowe and Kahn 1997). The notion of “active ageing” was first promoted during the United Nations’ Year of Older People in 1999 and was embraced by the World Health Organisation (1999). It was also endorsed by the Organisation for Economic Co-operation and Development, whose interest was in the policy link with productive ageing. Alongside European Union activity in this respect, emergent criteria for active ageing became explicit and covered aspects such as working longer, retiring later, being active after retirement, engaging in health sustaining activities and being as self reliant as possible (Davey 2002). In short, the preoccupation was with health and independence. However, it was not until

Better Government For Older People (Scottish Executive 2001) that the ideas of active ageing and lifelong learning were treated as related entities in the United Kingdom.

Nevertheless, perceptions about later life are seldom neutral. Ageing remains characterised by a phenomenon of binary opposition. Older people are either imbued with notions of decline and are therefore a burden on society, or are considered to be extra-ordinary in their ability to achieve and succeed despite their age (The Joseph Rowntree Foundations' Older People's Research Programme 2000 – 2004). This research suggests that many older people do not subscribe to these polarised positions but rather consider themselves to be ageing in an ordinary fashion reminiscent of the conclusions of Bytheway (1995) on anti-ageist responses to growing older. From a Foucaultian perspective such oppositional images objectify and exclude. Marginalisation occurs in research, policy, theory and practice. While the concept of reducing social exclusion is part of the government's agenda for social change, older people may be more akin to expatriates than trustees and remain a group large in number but low in political or civic influence (Walker 1998).

Arguably, older people contribute considerable human and social capital in terms of life experience as the quote from Laslett (1989) implies in the opening to this introduction. However, Cole (2000) maintained that older learners only appeared in Labour's vision of the learning society if they could be persuaded back into the labour market either as voluntary workers or returnees to paid employment. The notion of social capital which is concerned with community cohesion and shared community action brings with it ideas of quality of life. This is often perceived as an important reason for learning in later life and may be predictive of sustained health and wellbeing (Carlton and Soulsby 1999). Although not written with a focus on older people, Schuller and Field (1998) analysed the relationship between human capital, social capital and the concept of lifelong learning. They concluded that this was complex and contested territory and that there needed to be an exploration of the kind of relationships that promote social capital.

Lifelong learning

The concept of lifelong learning emerged in the UNESCO report *Learning To Be* (Faure et al 1972) which emphasised the advantages of education for adults as a lifelong process. This included older learners implicitly rather than explicitly. However, Edwards, Ranson and Strain (2002:2) contend that it was only in the 1990s “that lifelong learning has become a significant part of policy development – and that shift in discourse is significant”. Attendant values include justice, equity and the quest for democratic citizenship. Rejection of the front-end model of learning and education and acknowledgement of non-formal and informal educational experiences is part of the vision. Lifelong learning is conceived as an eclectic and holistic process without demarcation points (Jarvis 2001). However, this is also a contested set of ideas and lifelong learning may remain an idealised political goal in terms of a life course perspective. The reality is that economic competitiveness remains the major driver in practice (Field 2002). From emphasis and coverage in *Life Through Learning Through Life* (2003) the notion of the “learning society” may still be a euphemism for “working society”, and lifelong learning would appear to be more concerned with “learning for earning”.

Community education may provide older people with experience of lifelong learning. But in analysing the differences between community education and lifelong learning, there are quite different values and reference points that can affect older learners. Community education has an express social purpose and is located within communities and civil society. The language of empowerment is used as the underpinning for learning activities and local narratives are the genre employed to generate change. Community education is concerned with giving “voice” which is essentially part of active citizenship (Tett 2002). Conversely, lifelong learning is more ubiquitous. It has a more economic purpose concerning employability, and a State purpose rather than a social purpose. Johnston (2003) suggests that the discourse of lifelong learning could benefit from the values, beliefs and practices of community education, believing that there is enough common ground for useful partnerships in theory and practice.

Scottish responses and possibilities

Since devolution, a different way of conceptualising later life seems to be emerging in Scotland. Public recognition of this occurred in the creation of the Scottish Senior Citizens Unity Party and the subsequent election of John Swinburne as a Member of the Scottish Parliament in May 2003. This could prompt the possibility of a more politicised group of older people in Scotland, who may initiate a demand for education to underpin more active participation. In a modest way, increased activity appears to be occurring within the forums of *Better Government for Older People*. Education for democracy has also been the prevailing rationale for activities within The Royal Bank of Scotland (RBS) Centre for the Older Person's Agenda at Queen Margaret University College. Their position endorses critical educational gerontology, which aims to empower and equip people in later life to "give voice" to their concerns and "reflect a new politics of old age" as suggested by Walker (1998:17). In addition, local authorities in Scotland have been developing community learning strategies as a result of the Scottish Executive's response to *Communities: Change Through Learning* (1998) on community education. Comprehensive community learning plans and initiatives such as the Age Concern initiative, Link for Life, which uses senior health mentors to encourage other older people, are showing promise.

Despite notable silences about later life within *Life Through Learning Through Life* (2003), there is a range of possibilities open to older learners in Scotland. For example, there is the long-established Senior Studies Institute at the University of Strathclyde; an older people's web-site offered by the Scottish Executive; Learndirect Scotland; the Older People's Unit at the Scottish Executive; Older People's Consultative Forums; the continued outcomes of the policy *Better Government For Older People* and the prospect of an Older People's Commissioner. Those activities may herald a positive climate against which to lobby for improved and targeted educational services for older learners and in particular, to argue for the development of social policy in consultation with older people that reflects their needs and purposes.

Social gerontology

Social gerontology is the study of the social lives of older people and this discipline has a close relationship with educational gerontology. It concentrates on meaning and lived experience in everyday lives as explained by Gubrium and Holstein (2000). Since the 1950s it has sought to reduce negative perceptions of ageing, and endeavours to find means to “give voice” to older people. Literature in social gerontology reveals that chronological age is frequently the axis around which ideas and issues concerning growing older revolve. It becomes part of a powerful demographic, developmental and economic discourse that perpetuates negative stereotypes. Popular cultural constructs in this respect include inflexibility, resistance to change and dependence (Bytheway 1995; Carlton and Soulsby 1999; Elliott 2000; Withnall, McGivney and Soulsby 2004 and Findsen 2005). This has particular implications for learning in later life, what older people are offered and why they want to learn. Hobbies, leisure activities, exercise and helping older people learn about computers remain the traditional possibilities on offer rather than attempts to encourage active citizenship. It is an interesting omission considering that older people represent some of the most active citizens in terms of volunteering and involvement in local community groups.

A pessimistic discourse of learning in later life has also dominated mainstream social science. Retention and processing of information was considered to be difficult together with a lack of will to embrace new ideas (Bond, Briggs and Coleman 1993). Challenges to this stereotypical view have occurred as a result of studies by eminent gerontologists such as Baltes and Schaie (1997) and Schaie and Labouvie-Kemp (1974). The consensus from those researchers was that global intellectual decline was not an inevitable feature of growing older and that, conversely sensory difficulties, understimulation and social impoverishment were the main variables and constraints. Also, Midwinter (1982, 1984) found that when equal opportunities were offered, people in later life were capable of pursuing any course of study. Subjective ageing however is also prone to the influence of stereotype (Dench and Regan 2000). As their study progressed it became evident from self-report that older learners lacked confidence and believed that the advantages of learning should be targeted towards young people who could use it more directly in pursuit of careers or personal development. So exclusion can be self-imposed but prompted by a sense of being on the periphery of society, as

outlined by Levy (2001). Older people bring biographical accounts to the learning situation and have diverse reasons for wishing to pursue learning and education in later life (Phillipson 1998). This has prompted authors such as Withnall (2003) to focus upon the meaning of education in the lives of older people but also to align educational gerontology with lifelong learning.

Educational gerontology

Educational gerontology is the study of learning and education in later life and it grew out of the disciplines of adult education and social gerontology. Peterson (1976) was the first academic to define the field in a comprehensive way, which included educational opportunities for older people, education for the public about growing older and specific education for professionals. Since that time, a considerable body of knowledge has evolved from research and practice which, according to Withnall (2002) in her overview of the field in the last thirty years, has served to raise consciousness about learning and later life. Education opportunities for older people includes University of the Third Age (U3A), possibilities attached to higher education such as the Senior Studies Unit at Strathclyde University and community initiatives. Jarvis (2001) has commented that third age education now resembles non-vocational adult education of a generation ago. The discipline is now distinctive with leading proponents in the United Kingdom including Midwinter (1982, 1984, 1993), Glendenning (1985, 2000, 2001), Jarvis (2001), Withnall (1992, 2000, 2002, 2003) and Findsen (2005). The discipline is also buoyant in Europe, China, Australia, the United States of America and New Zealand.

Parameters of the study

This thesis is concerned with exploration and interpretation of political and personal meanings concerning learning and education in later life. It arose from my continuing involvement as one of the facilitators for a course called Education for Participation run under the auspices of the RBS Centre for the Older Person's Agenda at Queen Margaret University College, Edinburgh. This Centre has a specific remit to work in partnership with older people and to be guided by their views and concerns. In 2001, staff who worked in this Centre obtained funding from the Scottish Higher Education Funding Council Widening Participation Metropolitan Access and Articulation to

Community Based Higher Education Delivery (MAATCHED) grant award scheme. Thereafter, staff from the University College were consulted about involvement in the project and I was recruited along with three other members of staff to assist in the pilot project. We all had specific personal and professional interests in working with older people. Together with designated staff from the Centre, we were involved in planning, designing publicity materials and helping realise the aim of the project which was to “develop, implement and evaluate education that maximises older people’s contribution to partnership working” (Dewar and Alexander 2002:2).

The philosophy of this Centre and the experience of working directly with people who were aged 50 plus in learning and educational activities prompted my desire to engage in a form of explorative and hermeneutic inquiry that involved collaborative activity. A number of participants had expressed the view that they had often acted as interviewees for studies, audits or other projects but did not ever learn about the outcomes. This left them with a sense of being important enough to act as informants but not important enough to share the findings or final recommendations with. They perceived a “them and us” situation and experienced it as unsatisfactory and disempowering.

Using a critical hermeneutic perspective, my intention in this study was to attempt a collaborative, heuristic approach to the exploration and understanding of the meaning of learning and education in later life. My privileged authority as researcher was reduced and the study was designed to facilitate ownership of the ideas, feelings and opinions. Interviews were treated as social encounters in which knowledge was constructed and co-constructed and the process by which meanings unfolded was shared in the focus groups. I was accountable to the group and at two points in the year shared emergent analyses. In this theoretical framework, meanings are located rather than discovered and continuous reflexivity about the process is axiomatic. Learning is an activity, which engages the affective domain as well as the cognitive domain and the participants had diverse experiences of educational opportunity, which involved mixed emotions. Experiences had affected self-esteem, self-concept and subsequent learning identities. Although the intention was to concentrate upon “topic-centred narratives” as outlined by Reissman (1993:18), learning could not be conveniently separated from the rest of life and this presented a challenge within the process.

Research questions, aims and objectives

The research questions that this thesis evolved from were:

- Had lifelong learning policy impacted on the lives of participants?
- What were the meanings of learning and education for people in later life?
- How had learning and educational biographies influenced learning and education in later life?
- Did individual and political ideas about learning and education coincide or diverge?

The aim of the thesis was to explore the nature, purpose and meanings of learning and education through the individual and collective perceptions of a group of older people. This had been postulated as a particular requirement in research concerning educational gerontology by Withnall (2003) in the United Kingdom and earlier by Courtenay and Truluck (1997) in the United States. They considered that making sense of experiences was a major task of later life. It was also recognised that such learning occurred against a changing cultural and policy background that included how ageing was socially constructed, changes in retirement and demographics. In keeping with the spirit of the Doctorate in Education, associated aims of this inquiry were to explore how issues and interpretations of learning and education in later life were constructed and constituted within and between policy, practice and the consciousness of older people themselves.

The objectives of this thesis were:

- Within a focus group meeting, to engage with participants in analysis of the most recent lifelong learning policy in Scotland, *Life Through Learning Through Life* (2003) to elicit perceptions about values, social relations, learning culture and inclusion of older learners.
- To conduct in-depth topic-centred narrative interviews with ten older people to explore personal stories and narratives about learning and education over the course of their lives.
- To engage in critical and reflexive dialogue in a further two focus group meetings with the same group of older people to critically discuss emerging findings about the meaning of their own learning stories and possible links between personal experience and political discourse.

- To ultimately attempt interpretation and conceptual synthesis of policy and personal narratives, which may contribute insights about the nature, purpose and meaning of learning and education in later life.

Terminology and the issue of voice

It is acknowledged that there are semantic differences in the literature in how older learners are described and working definitions for this study are contained in the Glossary of Terms at the beginning of the thesis. In keeping with the spirit of the study, I write in the first person to reduce authorial distance (Holliday 2002). However my intention was also to achieve textual polyphony by sharing the voices of participants throughout the thesis (Bryne-Armstrong et al 2001). Although I use the term “group” throughout to describe the participants, this does not convey a belief that the nine individuals are homogeneous.

Thesis structure

Following this introduction, the thesis proceeds with a review of selected literature informing this area. Chapter two covers contextual issues around lifelong learning policy in relation to older people, a critical overview of educational gerontology from its inception to the present day and a review of literature which links learning to wider benefits of wellbeing and quality of life. Chapter three is concerned with methodology based within a critical hermeneutic tradition and an overview of methods used in the study. Chapter four outlines the findings from this research, and is presented in four parts, covering thematic analysis of the focus group material, thematic analysis and narrative analysis of learning stories, analysis of the research process and reflexive analysis. The discussion in chapter five deals with perceptions of the impact of political discourse around lifelong learning, theoretical issues and personal agency, emergent issues about the meaning of learning and learning identities and finally critical discussion about the strengths and limitations of the study. Chapter six offers my conclusions to the study and recommendations for future work. The participants provided a Postscript, which concludes with their view of the experience and I have not edited this.

Chapter 2: Literature review - evaluating the existing corpus of knowledge

Structure and aims of the review

My aim for the literature review was to proceed from context to specific outcomes and:

- Locate older people within broader conceptions of the social purpose of learning and education to analyse how they are positioned.
- Explore and analyse debates within educational gerontology over the last thirty-five years.
- Critically evaluate claims in the literature for the benefits of learning and education in later life.

There is not a substantial corpus of published research in this area. Theoretical and scholarly literature is the norm although, Glendenning (2001:66) argued that “the body of knowledge about third age education has never got beyond the anecdotal”. Nevertheless, in the last decade under the auspices of the ESRC, NIACE and the Joseph Rowntree Research Foundation, more findings from research are accruing. A detectable shift towards participatory and collaborative approaches in research involving older people can also be found in the literature.

My search strategy involved selection of literature from policy, practice, theory and research since the definition of educational gerontology by Peterson (1976). It included a review of key texts and seminal work in the area, peer reviewed journals that dealt with learning and education in later life and key policy documents. Literature was drawn from the United Kingdom, America, Canada, Europe, Australia and New Zealand from 1960’s to the present. The databases accessed were ERIC, CINAHL, PsychLIT and MEDLINE. Hand searches of relevant chapters in published texts, websites and unpublished work relevant to this topic from personal communication, conference and personal networking was also included.

Macro influences upon learning and education in later life: or the “needle in the haystack phenomena”

There has been a long gestation period for lifelong learning but, midway through the first decade of the millenium, there remains sparse acknowledgement of the learning needs of older people within

published literature. Successive reports such as *Learning To Be* (Faure et al. 1972), *Learning – The Treasure Within* Delors (1996), *The Kennedy Report* (1997), *The Fryer Report* (1998) and more recently *Life Through Learning Through Life* (2003) in Scotland, have not been sympathetic to the learning needs of older people. Textual analysis of this latter policy informed by the work of Codd (1988) and Ozga (2000) revealed a document rich in vision but low on inclusion of older people. It conveys optimistic messages for all citizens about learning being pivotal for wellbeing throughout the lifespan but only mentions older people five times. These references to older people were in the context of demographics and how they could be encouraged to remain within the workforce. Or, in this dubious quote by Henry Ford “it is the man who stops learning whether he is 20 or 80, who is really old” which equates ceasing to learn with being “really old” *Life Through Learning Through Life* (2003:16). As with previous educational policies, the emphasis is on financial competitiveness and the social aspect of education is noted rather than discussed. Further anomalies include the declared emphasis on social justice but with sparse text to support this and scant attention to how the policy might be operationalised across the life course. As with the previous policies, older people are implicitly rather than explicitly included. Such omissions caused Williamson (1997:176) to doubt political will, and together with residual ageism, and “society’s definition of ageing in chronological terms” a triple jeopardy for older learners is sustained. Issues of social equity emerge from those policies, which have been elaborated on by Schuller and Bostyn (1992) and in the policy discussion paper by Carlton and Soulsby (1999).

Lifelong learning is conceptualised within notions of a learning society. Here, less emphasis is placed on the formality of education and the respective dedicated space to implement it such as schools and universities. The focus is upon the process of learning in diverse situations. Amongst the potential benefits that this accrues include active citizenship, a more inclusive society and acknowledgement of lifelong learning’s expressed social purpose. Advocates of learning and education for older people have embraced those principles and practices that promote learning across the life course. Initiatives such as *Better Government For Older People* launched in 1998 and the *National Services Framework for Older People* (2001) are encouraging in this respect and seem to indicate a direction for the specific and authentic involvement of older people within policy making.

Certainly, Walker and Naegele (1999) consider that the politics of old age has entered a distinctively new and participatory phase. Curiously however, this book does not contain reference to educational policies but remains focused upon health and welfare. Thus, unwittingly a discourse about dependent older people may be sustained instead of locating them within the full range of social policy.

The issue of invisibility within social policy has preoccupied writers such as Phillipson (1998), who in his work on reconstructing old age urges emancipation from perceptions of traditional ageing.

Likewise, Blaikie (1999), who writes about the contemporary culture of ageing foresees different attitudes towards older people in the future as “babyboomers” born in the 1940’s and 1950’s retire and demand social inclusion. Nevertheless, people currently in the third age feel socially marginalised from political discourse that celebrates and promotes lifelong learning. Any search of the literature which tries to locate older people within macro ideas of the learning society and lifelong learning, citizenship or social capital results in disappointment. It is akin to seeking the proverbial “needle in a haystack”. Using Thompson’s (2003:86) analysis of how such discrimination occurs and particularly the concept of “invisibilisation” it suggests that the social policy reality for older people is problematic. “By invisibilising relatively powerless people, dominant social groups are able to maintain their hegemony relatively unchallenged” Thompson (2003:87).

Attempts to locate older people within literature extolling the social purpose of learning and education

Over the last decade, it is evident that a discourse of learning has replaced a discourse of education. Jarvis, Holford and Griffin (2003) in a text dedicated to the theory and practice of learning, give one of the clearest expositions of the changes in education and the emergence of lifelong learning as the prevalent discourse. The book is notable for its clarity in analysing the social background of lifelong learning and the changes within education from modern to postmodern society. They note thirteen separate conceptual and practical shifts in emphasis concerning education. This includes the transition from pedagogy through andragogy to lifelong learning, changes to the philosophy of curriculum and the fact that language about learning has acquired a social institutional meaning in the inception of the learning society. The text does note demographic changes and anticipated increase

in third age learning. It also makes interesting comments about how liberal education is now considered as a leisure pursuit offered within non-formal institutions such as the University of the Third Age. While proportionately coverage of issues directly related to learning and education in later life is low, at least it is acknowledged. This is possibly related to the fact that one of the authors has specifically written about learning and education in later life (Jarvis 2001, 2004).

The analysis of change and overview of the social background for lifelong learning in Jarvis, Holford and Griffin (2003) is wide ranging. It includes globalisation, demography, changes in working practices, decline of the Welfare State, the commodification of learning and the accent on individualisation. It poses questions of conceptual and practical adjustment for older learners who were socialised by a very different kind of educational ethos in their early years. Envisaged as survival mechanisms for citizens is the capacity for reflexive thought and confidence in reconstructing what learning means. Similar to expectations of personal responsibility for our own health within a postmodern society, so too are we now responsible for our learning needs. In this kind of analysis, teachers become facilitators, learners become autonomous and must survive and thrive on uncertainty. No conclusions or resolutions are offered in this text for practitioners. With respect to older people, they are accredited with instigating successful non-formal education. Also, note is made that their learning is not tied to economic imperatives but linked with value added aspects such as health and quality of life, experience of active citizenship and contribution to a society which values learning as social capital.

Issues about citizenship

This set of ideas led to a quest for literature about active citizenship and links with lifelong learning, which may include older people. Coare and Johnston (2003) was chosen because they explore the relationship between adult learning and citizenship. Although I was drawn to this text because of the emphasis upon marginalised groups, only one veiled mention of older people is made in the entire text. It offers chapters on people seeking asylum, disabled people and excluded young people and there is specific discussion of the notion of the “invisible citizen” from Houghton (2003:125) without reference to older people. There is even a reference to community adult education literature, which

acknowledges age as one of the aspects of social structure that produces inequality (Taylor and Ward 1986). In an otherwise excellent text that covers theory and a review of existing community practices and culminates in ten propositions for practice that are certainly transferable to learning in later life, this omission is striking. It begs the question of why this has occurred when the values, ideas and principles of the text are about adult education working for an inclusive society? Here older people are not marginalised within key literature, they are excluded entirely.

Defining citizenship is difficult, but most of the literature refers to the seminal work of Marshall (1950) and the delineation of three dimensions, namely social, civil and political, all with reciprocal responsibilities to society. Coare and Johnston (2003) note the adjustments that have been made to that definition over time and the way that the concept of citizenship has entered the political arena. To illuminate this, Cairns (2003:110) explains that the concept of “active citizenship” emerged in the 1980s from the Conservative government, and was concerned about passive citizenship in relation to the welfare state and subsequently exhorted individuals to take more responsibility for their own health. In this educational context, the concept lightly veils a focus upon individual responsibility for learning and the possibility of citizenship education being more about incorporation into the current political hegemony. Extending that argument absolves governments and those who allocate resources from any responsibility to provide learning opportunities because it would dilute individual self-directedness. From this viewpoint, the University of the Third Age is an exemplar. Higgs (1995) in a penetrating analysis of the new relationship between old age and citizenship reveals how the cultural processes of postmodern life are altering older people’s own perceptions of themselves. He proposes dropping allegiance to structured dependency theory, because it tends to group all older people as if they were alike, and revising views about citizenship theory because the substantive rights of social citizenship are not being realised in the lives of older people. His alternative is to promote a more reflexive view of later life to understand how cultural issues impact upon older people.

Are older people part of the learning society?

Ranson (1998) directly addresses citizenship in relation to its role in a learning society. He highlights that the idea of a learning society emerged at a time of political, social and technological change and

traces the historical evolution of the term. Two clear points of reference are stated. One emanates from the late 1960s and includes the work of Hutchins (1968) and Husen ((1974). The next period which emerges in the 1990s includes his own work (Ranson 1991) that of Ball (1990, 1991) and Ragget et al (1996). No clear explanation is given of the silence about this idea in the intervening twenty-five to thirty years but it seems as if this was an incubation period where the centrality of education as an entity receded and learning became the key construct. Alongside this conceptual shift, the rise in technology, growth of the information society, more acknowledgement of informal or non-formal learning and changes in formal education have occurred. Different theoretical perspectives concerning the learning society exist including those of more radical educators such as Illich (1971, 1973) and Holt (1971) both of whom argued for a more active, learner centred form of participation in education. For those writers, analysis of power was the key feature. Adult educators were enthusiastic proponents of this approach, which conceived education as a force to shape society, and it underpins the rationale for critical educational gerontology.

Spirited critiques of the concept of the learning society emerged from Hughes and Tight (1998), who argued that it was founded upon a series of interconnected myths. They believed that the concept is utopian, chameleon-like and means all things to all people. As an idea, it has no empirical validity and from a “functionalist perspective, its purpose is to maintain a false consciousness about the structural positions of labour and capital” (Hughes and Tight 1998:187). In such a perspective, older people need to adjust to the norms of society with no analysis of how social structures limit opportunity. There would certainly be little possibility of ever gaining purchase upon social policy because of economic exclusion. Ranson (1998) welcomes this critique but merely reiterates his philosophy linking the idea of a learning society with a participative democracy and the emergence of active citizenship. A new commitment to learning is the axis around which this philosophy revolves, implicitly including everyone in society. However, perhaps this is not a new view of learning but the restatement of values. Disappointingly, there is no mention of intergenerational initiatives, of the contribution that older people could make in a vision of a learning society and sparse explanation of how the vision could be operationalised.

The Scottish dimension concerning the learning society and where this connects with lifelong learning has preoccupied a number of writers recently. Osborne and Edward (2003:116) were concerned with the nature of this ambitious policy, whether it is founded upon an evidence base and what the relationship is between policy and research. They contend that lifelong learning is “poorly understood despite its policy popularity” and echo the concern of other theorists that it is predicated upon an economic set of principles and as such restricts the impact of the policy to those of working age. While they recognised the social purpose of lifelong learning as a kind of sub-plot they give it scant coverage. Nevertheless, the work is of importance to this thesis in terms of drawing attention to the complex relationship between contested ideas, research evidence, policy and hence practices. Moodie (2003), writing from an Australian perspective, heralds Scotland as distinctive and a leader in its national commitment to lifelong learning but he does not underestimate the inherent problems in operationalising lifelong learning as a single system whereby every person can seek a range of learning opportunities throughout their life. He implicitly likens it to the “cradle to grave” values of the inception of the National Health Service and in a similar vein to Osbourne and Edwards (2003) points out the problems of implementing a policy of such breadth and ambition. The problem remains of how this policy will support under represented groups within the same resource allocation. No mention of learners outside formal educational settings is made in this paper.

Field (2002) gives an historical account and critique of the impact of the learning society and attributes the genesis of the term to Husen (1974). He considers that the basis for the idea concerns “plasticity of human ability and capacity to adapt and change to differing circumstances” Field (2002:38). However, he is suspicious of an entrenched situation whereby people become “permanently learning subjects”, where their life chances are directly related to their willingness and ability to avail themselves of education and training opportunities. In relation to older people, there is evidence to suggest that retirement is experienced as the watershed for this type of involvement with a marked fall in participation after that period (Tuckett and Sargant 1999; Carlton and Soulsby 1999). However, Field reminds us that another interpretation of the lower participation by older adults may be the increased expense of adult education and reduction of extra-mural provision from Universities in the early 1990s.

Human capital or social capital?

In a quest for research that seemed closely aligned with my study in terms of context and methodology, I explored the work of Cloonan and Crossan (2002). They used qualitative methodology to investigate ways in which policy on lifelong learning directly influenced the lives of people in an area of social deprivation in the west of Scotland. They link the ideas of lifelong learning to those of human capital and social capital as a means of evaluating the situation within their area of interest. In short, their view is that the dominant discourse of lifelong learning policy rests upon notions of human capital to the exclusion of social capital. This simply implies that education would increase the life chances of individuals who are in a position to participate and make them more economically viable. This straightforward equation negates the contribution of people who are not in employment and reinforces the view that lifelong learning is solely about “learning for earning”. Also, relationships between human capital and social capital are not explored. While those researchers did not aim to include older citizens, the messages are transferable. Other writers such as Coffield (1999) and Schuller (1997) sought an alternative way of conceptualising this issue and proposed that social capital might be a more helpful way of conceiving the practical outcomes of lifelong learning. With an expressed alignment to the social benefits of education for older people, this proposal invests in networks and collective approaches to learning. The concluding statement from Cloonan and Crossan (2002) views the current operationalisation of lifelong learning as a “partial discourse” which has particular resonance for learning in later life.

Creating a learning society is not an endpoint but implies that society itself can develop capacity to learn, adapt and flourish as a result of increased reflexivity, according to Ranson (1998). This would produce active citizens who learn from experience and are empowered to tackle issues of social inclusion in situ rather than researchers or policy makers producing theoretical ideas on this subject. Edwards, Ranson and Strain (2002) seek to develop a theoretical basis for lifelong learning based upon reflexivity which would counteract the prescriptive recourse to increasing skills as the fundamental outcome of lifelong education. They outline the gargantuan task of lifelong learning policy tackling the creation of a learning society and highlight the gaps between strategies, policy and

practice with the illusion that lifelong learning could deal with all the problems in society. Their analysis echoes that of Hughes and Tight (1998) and illustrates how many of the assumptions are based upon an outdated view of society, which fails to recognise contemporary complexities. Active citizenship requires that people are informed and can understand wider social reasons for problems with participation in learning. Edwards, Ranson and Strain (2002:531) contend that there are theoretical and practical gaps whereby lifelong learning is being developed through policy, but with limited research into people's learning practices and in a situation where "there is no explicit attempt to develop a theory of learning by which the policy can be informed". They cite educational gerontology as good practice and particularly the work of Withnall (2000), that examines the learning of older adults rather than laments their lack of participation as a model to emulate. They argue that a theory of learning is required which "integrates different types of learning, analyses the distinctive nature of reflexivity and theorises learning over a lifetime" (Edwards, Ranson and Strain 2002:532). Learning through this philosophical lens is not about accumulating skills but facilitation of a transformative critical consciousness leading to personal and social change. This possibility has particular potential for learning in later life where people have negotiated the transition from work and are in the process of devising different identities minus this component.

Modest evidence of change in the literature

Older people are increasingly challenging structural inequalities as Walker (1998) noted in his lecture, which celebrated the silver jubilee of the Beth Johnson Foundation. He postulated that there was a new politics of old age in Europe, characterised by a growing confidence amongst older people and a detectable shift from acquiescence to dissent about policy and practice. This may be echoed to some extent within the Scottish experience and the electoral success of the Scottish Senior Citizens Unity Party in 2003. Walker makes some important points in this work about the growing politicisation of older people, which in turn link to the ideas of social capital. He also highlights the fact that political activity is likely to be increasingly feminised. Within the United Kingdom, he believes that local authorities will be the site of increasing participation of older people, ensuring that they have a voice in policy making rather than merely consultation about policy which has already been generated (Walker and Naegele 1999).

Some years earlier, Young and Schuller (1991) postulated the arrival of the ageless society. They talked with one hundred and forty nine older people in Greenwich chosen at random about how they were coping with retirement. The sample group were asked to fill in a diary showing how long they spent in various activities every quarter of an hour over two week days. Young and Schuller resisted the tendency to present older people as a homogeneous group; instead the work represented a varied group of people, some of whom rejoiced in retirement and others who had not thrived. Those with a positive approach to life seemed to have recreated a balance of occupations and a time structure that was fulfilling, while the “negative third agers” existed in a time structure that had collapsed. As researchers, they developed a critical approach to the way that older people were viewed and dealt with in the United Kingdom. Amongst their recommendations was a challenge to the existing retirement age and a need to challenge age discrimination, which has taken a further fifteen years to become law. Interestingly in their view, a second education system, which had support from the government, was considered a necessity. A third age careers’ service was proposed as an issue of intergenerational justice. Also, a connection was perceived between the old and the young in terms of disadvantage and marginalisation. In their view, older people were the “true revolutionaries of modern society” and the work is a fierce critique of age discrimination. It is a useful and interesting account more because of its attempts to embed findings within a view of society rather than start from an assumption that older people had to fit into existing parameters. Many of their ideas have reached fruition, such as the banning of age discrimination for employment, but their vision has not been fully realised in terms of their other suggestions.

Brown (2004) has made a more recent challenge to ageist discrimination in connection with learning. Her essential belief is that older people have been insidiously labeled as unable to learn through research on cognitive decline. Using a grounded theory approach, she differentiated the meanings of learning between three different groups of older learners. These included a group from the Open University, a group involved in University of the Third Age and a group of older people from care settings. Her conclusions revealed different motivations for learning which seemed to reflect their social and personal contexts. However, in the final analysis, Brown believes that learning in later life

should be less about improved health and reduced dependency, thereby reinforcing a functionalist paradigm, and more as a force for the emancipation of society from ageism.

Another optimistic text about growing older is Jarvis (2001), who takes a life cycle approach to explore learning in later life and contends that it can be a time of intellectual growth and emotional maturity. He is interested in the connection between lifelong learning, retirement and a new identity. Although there is a clear sub-division between the third age (50 – 74) and the fourth age (after 75) there is the enduring belief that people can learn continually throughout their lives regardless of frailty. Amongst the ideas covered in this book is the concept of new roles for people post retirement which includes working as researchers, volunteers, mentors and teachers. International examples are given from Germany for example, to illustrate how older people act as mentors for younger people in setting up their own businesses. This is based on the theoretical idea of generativity (Erikson 1963) where the person wishes to guide the next generation. Projects based in schools whereby older people volunteer to be mentors and help children and young people understand intergenerational issues have also proved to be highly successful. Jarvis is making the point throughout the book about the extent to which older people can contribute to the social capital of a community and that they are a precious resource. The ideas resonate with Laslett's (1998) view of older people as trustees of the future. Jarvis has published on this theme for over twenty years. He is known internationally as an authority on adult and continuing education but in recent years has focussed upon learning in later life. A qualitatively different approach is taken by Jarvis than other authors in this area, characterised both by his belief in liberal education and the intrinsic nature of learning for living.

Without question, the writer who has linked lifelong learning to third age learning most consistently is Withnall (1992, 1997/8, 2000, 2002, 2003, 2004). She acknowledges the concerns voiced in the earlier part of this review that older people are not visible within educational policy or lifelong learning. Compelling reasons for their inclusion in the debate are given, not least the emerging evidence concerning learning and health (Khaw 1997, Aldridge and Lavender 2000). Amongst her most recent work is a handbook, which seeks to dispel common myths about learning in later life

(Withnall, McGivney and Soulsby 2004). Each of the contributors offers a discrete part with one author reviewing evidence and dispelling the myths, another considering what those findings can mean for older learners and the third author providing examples of work in progress. As such, it provides a working text for a wide readership including older people. Based upon NIACE's participation survey (Aldridge and Tuckett 2004) showing dwindling participation in educational activity amongst older people, they explored the evidence of exclusion in learning opportunities. One of the key aims of this piece of work was to reach older people who did not know how to access education. From an optimistic starting point about current policy acknowledging the fact that discrimination in the workplace will be outlawed in 2006 and the *National Service Framework* (2001) which validates the importance of lifelong learning for health, Withnall, McGivney and Soulsby (2004) provide a valuable working text for practitioners. The impact of *Better Government For Older People* has clearly demonstrated that many older people want to be involved in their local communities and this is continually emphasised in each section. The handbook both challenges ageist attitudes about learning in later life and provides a forum for discussion.

Another ethical argument is the concern about rights to educational opportunities, which Schuller and Bostyn (1992), Carlton and Soulsby (1999) and Elmore (1999) support. This moral argument had been the stimulus for the inception of the Forum on the Rights of Elderly People to Education (FREE), which regrettably has disbanded. Withnall (2002) considers that the ideas behind FREE may need to be resurrected in light of demographic imperatives and principles of equity of opportunity. For Glendenning (2001) and Withnall, one of the problematic issues in educational gerontology is that it is largely atheoretical and that there needs to be a shift from an emphasis on education towards learning as the predominant informing construct. This also means learning in its widest sense and upholding the value of informal learning. The challenge in acquiring empirical evidence about relevance and purpose is to involve older people themselves as researchers. This has been successfully carried out on a number of projects including Glanz and Neikrug (1997), Chambers and Pickard (2001), Leamy and Clough (2001), Findsen and Carvello (2004) and the work on policy carried out by The Joseph Rowntree Foundation (2004). In all of those ventures, older people collaboratively generate new knowledge and challenge the dominant practice of being objects of

investigation. They contribute to the planning, executing and dissemination of findings from projects. Glanz and Neikrug (1997) contend that in this way older people assist in shifting the emphasis from issues of service delivery, care giving and disability towards wellbeing, creativity and the advantages of ageing. As such older people are contributing to the “graying of social gerontology” and “finding new paradigms for understanding ageing in the twenty first century”, according to Glanz and Neikrug (1997:826).

To précis the findings from this section of the literature review, there has been a shift from a discourse of education to a discourse of learning within policy and practice and educational gerontologists welcome this. Nevertheless, older people are virtually invisible within the literature of lifelong learning, the learning society and associated ideas of active citizenship. This continues despite a discourse of lifelong learning in the educational gerontology literature for over twenty years. Both lifelong learning and educational gerontology are perceived to have developed without a substantial theoretical base and this causes problems for practice and research. There is a consensus in the literature that economic imperatives prevail and social purposes seem difficult to constitute in policy. Literature can be found which reveals a new politics of old age (Walker 1998) and changes in ageing and popular culture (Blaikie 1999). In terms of active citizenship, there are examples of older people becoming increasingly involved in the generation of new knowledge. Increased participation by older people in this respect is the most significant development over the last decade.

Educational gerontology: a parallel discourse?

There is a discrete body of knowledge about educational gerontology in the United Kingdom. Until 2002 there was one dedicated journal, but this has now amalgamated with an international publication. A growing number of interdisciplinary devotees promote the discipline through teaching and research. Interest is also robust in Europe, China, North America, New Zealand, and Australia. A distinguishing factor is the democratisation of the field, with direct involvement of older people themselves evident in the Third Age Learning International Studies Conference, held in Glasgow 2005. Characteristic of most developing disciplines, the literature conveys quests for a robust philosophical base, paradigm shifts, and demands for more research. It relies on a close relationship

with social gerontology for synthesis of ideas for example, Phillipson (1998), Vincent (1999) and Blaikie (1999). There are interesting parallels in the development of both disciplines towards a more critical discourse, which strives to emancipate older people from all forms of oppression and domination (Moody 1993). Twenty years ago, Glendenning (1985:34) in an overview of educational gerontology within international perspectives, considered that in Britain, there was only a “prolegomenon to a body of knowledge”. Also, at that point, there was dependence upon American sources of knowledge for example, Peterson (1976).

Elliott (2000:4) was equally concerned about the lack of a British theoretical position which in his view had “contributed to the oversight of the issue of hegemony of populist ageist stereotypes within academia”. He predicted a situation where older students would switch from being marginal politically to becoming vital to the government’s lifelong learning strategy and necessitate a more comprehensive learning provision for older adults. This paper provides an interesting analysis of theoretical issues, whereby traditional theories are seen as redundant and generational theory and contemporary theory are offered as alternatives. In an area where theoretical ideas are often outmoded, this represents a valuable contribution. He criticises generational theory because it fails to recognise cohort differences and tends to rely on fixed values and attitudes. Contemporary theory by contrast attempts to deal with change by recognising that people adjust accordingly to current trends, mores and ethos. It promotes analysis and evaluation of socio-political context and how older people can be understood and viewed within that context. For Elliott, gerontology was a field of study whose time had come as he witnessed older people becoming involved in policy, research and service provision. However, challenges to the notion that older people are different to others within society or have different hopes, wishes and aspirations continue. Negative stereotypes including the belief that older people cease to learn (Baltes & Schaie 1977, Brown 2004, Withnall, McGiveney and Soulsby 2004, Findsen 2005) have been difficult to shift.

In the intervening years, since Glendenning’s (1985) view of the embryonic state of educational gerontology, progress in the United Kingdom can be described as slow but steady. Findsen (2005:1) describes it as “spotty” and showing a dearth of philosophical debate. In mapping periods of activity

in educational gerontology since the 1970s a gathering momentum from the 1980s is apparent. Withnall (1992) believed that the evolution of educational gerontology within the United Kingdom resulted from the coalescing of four factors. They were demographic changes, interest in self-help education for older people, the pre-retirement movement and most significantly the lifelong learning agenda. Those issues continue to be the main drivers for interest in the education for older people, but the most significant shift has been the attempt to align educational gerontology with lifelong learning. Withnall (1992:23) concluded her article about the philosophies of educational gerontology by contending that “the future [of educational gerontology] may need to be subsumed within the developing philosophy of adult education as a lifelong process.” Nevertheless, as the previous part of the literature review revealed, this continues to be a parallel discourse rather than a reality in terms of older people being included in lifelong learning policy or in the writings of the theorists in lifelong learning. Lobbying, joint initiatives and a more radical reconceptualisation of lifelong learning across the life course seems necessary before there is genuine synthesis of the philosophies of educational gerontology and lifelong learning.

The proposed merging of educational gerontology with lifelong learning did not go unchallenged. A speedy response to Withnall’s (1992) proposal came from Battersby (1993:17) who considered that this was a “premature and unwarranted foreclosure” on the debate. While agreeing with her concerns about the dominance of the functionalist paradigm within educational gerontology, he extended her critique of liberal ideology. The conventional paradigm had sustained the status quo for both older people and practitioners in his view, and maintained the notion of older adults as passive and waiting for education to make them more compliant citizens in later life. In contrast, he urged use of the work of Schön (1983,1987) on reflective practice to generate informing narratives from both educators and older people themselves to build a philosophy of practice. This partnership between older people and practitioners could involve implementing and evaluating the future philosophical direction of educational gerontology. The tenor of his paper is more about practitioners becoming more critically analytical about their practice than a critique of a possible liaison with lifelong learning. Battersby seemed to be reacting to a possible annexing of the discipline and an uncritical acceptance that lifelong learning would legitimise educational gerontology.

Writing from an Australian perspective, Williamson (1997) does not refer to Battersby (1993) but takes a position more closely aligned to Withnall's as he makes a case for age-integrated rather than age-segregated education in later life and situates the issue within the lifelong learning arena. He does not mention educational gerontology, but upholds Battersby's view of the importance of reflection within a lifelong learning approach to education. His conclusion was that there was little evidence of Third-Age perspectives in existing definitions of lifelong learning. Without greater attention to what older people could offer, the spirit of inclusiveness, which was inherent in the original UNESCO vision of lifelong learning, could not be achieved.

The two major commentators on the field of educational gerontology in Britain over the last twenty-five years have been Glendenning (2001) and Withnall (2002), both of whom have made significant contributions. If Laslett (1989) has become known as the father of third age education, then those two academics must be considered the guardians by their indefatigable efforts to keep the profile of the discipline high in research, theory and practice. Both contextualise their chronicles of educational gerontology against changes in the way that later life is viewed and what it means to be older in the twenty-first century. A semantic smorgasbord is evident in how later life can be named and framed. The notion of the third age emerged from the inception of the University of the Third Age in France in 1973 and was originally used to describe people who had retired and were over sixty. However, with growing trends of early retirement in the 1990s the term switched to describe people over fifty. While Withnall has always sought greater differentiation in defining the learning needs of older people between the ages of fifty and a hundred plus, there is an inherent danger that attention to third age education may further marginalise possibilities in the fourth age (Soulsby 2000; Jarvis 2001).

Debates about practice

Peterson (1976) defined the field comprehensively to include how professionals could be better informed about growing older. However, in the United Kingdom, Glendenning (2000) considered that educational gerontology was about the education and learning potential of older adults including

all relevant aspects and processes. He sought to separate the actual educational opportunities for older people from the manner in which relevant professionals could increase their insight and understanding about learning and ageing. However, Battersby (1987) in a similar manner to Knowles (1980), who had separated ideas of pedagogy from andragogy in his bid to validate adult education, used the phrase “gerogogy” to refer to education in later life. His view was that a more sustained attempt to examine the practice of educational gerontology was necessary. The essential value system here is that there are different principles and processes about learning at those three points in the lifespan.

Themes of critical gerogogy have been sustained into the new millenium by Formosa (2002), who acknowledged the joint work of Glendenning and Battersby (1990) in stimulating others to find ways of empowering and emancipating older adults through educational practice. Formosa’s (2002:84) theoretical work attempted to synthesis critical reflective processes with actual experience of older people. Essentially this involved studying praxis and enabling older people to be more in control of their thinking and learning. He outlined seven praxeological principles for critical gerontology, which could support practice. It is a “theory of action” whereby older people can achieve agency and begin to change restrictive social structures. As a working title, the term “gerogogy” has not gained salience within the United Kingdom. However, the term educational gerontology may also need to be reconsidered in light of a growing discourse about learning instead of education as the key construct.

Debates about social equity

A key issue raised by Glendenning (2001) was legitimacy of third age education, which echoed Moody’s (1988) earlier concern about the peripheral profile of later life learning within policy in the United States. Schuller and Bostyn (1992) and Carlton and Soulsby (1999) addressed this issue within different reports and both found that learning was vital to older people for health and wellbeing, independence and quality of life. But the key issue was engagement of older people in the process of designing learning experiences and a different conception of learning than they had experienced during their schooling. Withnall’s (2002) review of three decades of educational

gerontology extended Glendenning's (2001) work and in her overview she notes significant contributions of educational gerontology. She noted the way in which the discipline had raised consciousness amongst academics and practitioners and had developed an interdisciplinary ethos. Also, a climate had been established within which discussion of the rights to educational opportunities of older people could occur. This thrust emerged from the political economy model of ageing (Phillipson 1998). But Elmore (1999) took a more philosophical position on the question of rights, equal opportunity and the status of citizenship. His essential belief was that there was an ethical and moral responsibility to provide educational opportunities for people in later life. While a consensus of interdisciplinary opinion highlighted the importance of this, politically it always remained peripheral to the resource agenda. Using the work of Rawls (1972) and Daniels (1996) he provided a convincing argument for social equity and the principle of rights on the basis of equality of opportunity, notions of citizenship and the expectation that the state would honour its obligations to its citizens in the distribution of social justice. Essentially this work underpins the philosophies of critical educational gerontology in supporting the provision of opportunity, which would enable older people to voice legitimate concerns and challenge violation of their rights. A departure was sought from outmoded theories of ageing that had their origins within a functionalist paradigm.

Paradigm shift

Critical educational gerontology stimulated a new discourse about growing older and how education could facilitate this. It drew upon critical social theory to examine the structured dependency of older people and works towards emancipation, empowerment and social change. This stance is about education for participation in all aspects of life including research, policy, practice and the generation of theory. It challenges issues of power and control by engaging older people in deliberate critique of how knowledge is generated and used. Proponents of this approach include Battersby (1987), Battersby and Glendenning (1992), Cusack (2000) and Phillipson (2000). Interestingly, Cusack (1999:21) was writing from a Canadian perspective at the same time as Elmore in the United Kingdom, and the crux of her argument was that educational gerontology could empower older people and provide "the method and the means for realising the possibilities and transforming individuals and societies". Her background is one of active research and teaching to develop seniors

as community leaders and service providers. She shares Battersby's (1987) notion of gerogogy that teaching older people is qualitatively different from teaching others because of their history and social location. Her work at Simon Fraser University in Vancouver is informed by Freire's (1972) concept of empowerment and seeks to help older people become critical thinkers within mental fitness programmes aimed at personal development and transforming attitudes towards growing older. Finsen (2005:134) challenges the muted approach to empowerment of older people in Cusack's programmes whereby older people collaborate in planning programmes, and describes this as "empowerment in a constrained, limited sense, a "softer " form of power relations". He supports a political economy approach to redistribute power and knowledge so that older people can make robust and informed claims for a share of resources.

The participatory research project that Finsen and Carvalho (2004:177) worked on in Auckland was underpinned by a critical approach locating the learning of older adults within their everyday social context. Their belief was that this was consistent with critical gerontology which "stresses the active reconstruction of identity in older age." Older adults were involved in the design, the execution and the analysis. Importantly, older adults were to be paid for their input. In their honest outline of the logistical problems and interrupted progress caused by unpredictable health of older co-researchers, they explain that the findings did not reflect the broad cultural mix of the North Island and that ownership of such a project was difficult to achieve. Their report constitutes work in progress and more joint analysis of the findings has yet to be completed. The work raises important issues of new paradigm research whereby researchers have to be prepared for altered timetables, to resist imposing their own agendas and to take time with issues of communication. This experience perhaps has led Finsen (2005:144) to be more pragmatic in the conclusion of his book when he notes, "However, most practitioners are part of the mainstream society and are unlikely to adopt an extremist position. For them, intelligent engagement with older adults to assist them to achieve their life goals is a realistic alternative".

To summarise this section, a number of themes are detectable. A continuing debate concerns the liaison between lifelong learning and educational gerontology and the view that as yet this is not a

dialogue but a parallel discourse. Contemporary lifelong learning policy has neither embraced the optimism of educational gerontologists nor shown any hint of a reconceptualisation of lifelong learning by taking a life course perspective. Debates continue about legitimacy and how to conceptualise practice. Almost mirroring developments within social gerontology, there has been a paradigm shift within the discipline to embrace critical and participatory approaches as a theoretical underpinning of educational gerontology. This has impacted upon practice and research.

Claims for the benefits of learning in later life: discourses about quality of life

Ideas of active ageing, successful ageing or productive ageing have begun to interest governments who wish to deal with the demographic increase of older people and the perceived financial burden that this might cause (Davey 2002). Also gerontologists such as Baltes and Baltes (1990) and Baltes and Carlestenen (1996) have become interested in what constitutes successful ageing, and a body of research is building in this area which is focused upon prevention of ill health and the promotion of wellbeing. Rowe and Kahn (1997) defined successful ageing in three inter-related components of avoiding disease and disability, high cognitive and physical function and engagement with life. They commented that in America, contrary to the stereotype of unproductive later life, older people were involved in volunteering, care-giving or other forms of informal help-giving activities that contributed significantly to the health of a community: in other words a contribution to social capital. While their intention was not to comment upon educational gerontology, the article was selected for study because previous education was an established predictor of productive activity and links with issues in my study. Interestingly, the terms “active or successful ageing” were perceived to be the language used by policy makers, researchers and service planners in the work by Reed et al (2003:71), whereas “comfortable ageing” was the preferred term used by older people themselves.

Dench & Regan (2000) within the United Kingdom set out to investigate the impact of learning upon the health and social well being of third age learners. This study grew out of the National Adult Learning Survey (1997), and re-interviewed 336 people between the ages of 50 and 71. They were asked about motivation to learn, impact upon learning and impact upon health. More specific work on motivation to learn was conducted with thirty people using in-depth interview techniques, which

revealed the importance of early influences supporting a lifelong interest in learning. It was an important addition to the field and as well as noting benefits, the analysis revealed barriers to learning which included involvement with families, ill health or lack of interest. One notable finding was that non-learners were more likely to have poor health on a variety of measures. The study provided evidence that a high proportion of people benefited from learning in terms of their general wellbeing. Dench and Regan (2000:92) report that “80% of participants reported improvement in self confidence, enjoyment of life, satisfaction with other areas of their life, how they felt about their self or ability to cope with everyday life.” Aldridge and Lavender (2000) endorsed this work through a small-scale survey of people that they knew to be already active learners. This study was part of the NIACE Learning and Health Strategy, and while it did not specifically target older people the age range was between 20 and 90. A postal questionnaire was sent to 2,000 individuals and 750 groups nominated for an Adult Learners' Week Award. There was a muted response to this with 473 individual and 47 group questionnaires returned. Findings were divided into general benefits, unanticipated benefits, “disbenefits”, physical health benefits, emotional and mental health benefits of learning. The balanced account of findings acknowledged the social, personal and economic benefits, but also the attendant “disbenefits” which included aspects such as stress, anxiety, role overload and dissatisfaction with their former way of life that learning had caused. However, in relation to the links between learning and health, clear physical and mental health benefits were noted by respondents.

Lamb and Brady (2005) also set out to learn why older people were motivated to study in later life. In this American study from a self governing, self-sustaining college for older people in Maine, the views of 45 older people were accessed by means of 6 focus groups. Themes from the groups revealed gains to intellectual capacity, experiencing a supportive community, enhancing self-esteem and having an opportunity for spiritual renewal. The authors endorsed the views of writers such as Merriam and Caffarella (1999) that locating the reasons for persistence with learning in later life was complex and multi-dimensional. One major finding was the perceived benefits from being part of a community of learners. Another unexpected finding was the spiritual component, which was described by one participant as “learning well means learning whole” Lamb and Brady (2005:222).

Withnall and Thompson (2003) from the ESRC Growing Older Programme, reported research findings on choices and experiences of older people and lifelong learning. This work was as interesting methodologically as it was for the outcomes. A broad range of methods including focus groups, learning logs, development and testing of a model of participation, questionnaires and interviews were used. Older people were trained and used as interviewers to maximise the involvement of those studied. Outcomes of learning in later life included self-satisfaction, keeping the brain active, intellectual stimulation, pleasure and enjoyment. The authors point out that it was important to acknowledge the very wide interpretation of what constituted learning. Informal learning made up a considerable percentage of older people's lives, and it is likely that this goes unrecognised in research on lifelong learning. However, it is difficult to determine the size of the sample group that the researchers worked with or how one part of the process influenced subsequent activity. Discussion of learning across the life course highlighted the complex interaction of variables which impacted upon someone's learning, and that people understood "learning" in a variety of different ways. The study indicated that older people were interested in a wide variety of topics. This is endorsed by the success of the Senior Studies Institute at Strathclyde University (Hart 2005) and indeed by the findings of Carlton and Soulsby (1999). Perceived outcomes of participation in formally arranged learning activities stressed the importance of choice and the relative freedom which retirement bestowed. The authors of the report also stressed the sheer amount of informal learning undertaken in later life.

Writing as an advocate for collaborative approaches between older people and practitioners, Dewar (2003) noted that the quality of life was a priority for local and national governments. This is enhanced if people feel that their voice is heard within policy and practice. With the assistance of two older people who had been course participants, she described an "Education for Participation" project which was designed to encourage wider involvement in community life amongst older people by giving them the thinking and analytical tools to engage with the material. Using principles of adult education whereby older people negotiated the curriculum, this article outlines what occurred on the course and more importantly how two participants viewed it. Their voices dominate in this piece

of work and reveal changes to their views of themselves and their abilities. Education in this experience was revealed as transformative and also gave directions for future learning. This project is notable because it reveals what the contribution from higher education in terms of value to the wider community can be. Changes in thinking had produced changes in action.

Another personal perspective of older people in higher education is given by Jones (2000:339), who maintains that lifelong learning can mistakenly be regarded as terminating upon retirement and that “among older people, the appeal of systematic study has been seriously underestimated”. In a comprehensive review of the potential demand for university style education based on statistical information, he noted that in 1997, there were over 10,000 people in the United Kingdom over 70 pursuing a first degrees. He considers that there may be three broad classifications of people post retirement that may wish to avail themselves of university study. These include people already educated and who wish to seek higher levels of attainment after retirement, which bears out the notion of liberal education and leisure equation; people who might have benefited from higher education in their youth but who were unable to avail themselves of this opportunity because of circumstance; and finally a large group of people who through lack of confidence considered that they would not be able to study and succeed in this type of education.

This account focuses on the advantages of disciplined and systematic study for older people. Jones lists seven clear gains, many of which are about making the transition from work to retirement. Personal fulfillment in study is linked to self-esteem and to personal development. Health is not specifically mentioned but it is implicit in the outlining of advantages of learning and study. One of the most interesting suggestions is the conversion of the notion of the residential home to that of the residential college. This resonates with some of the ideas of Jarvis (2001) who believes that there is an issue concerning fourth age learning which could contribute to the quality of life for older people. In Jones’s (2000:350) vision, this links with the idea of a learning society that is not restricted to the able-bodied. Everyone participates in this vision and in his words it could “provide the basis for a new style of life, where education and community for those in the second half of life are seen as desirable socially and as providing satisfying occupation”.

Themes concerning growing older and shifts in identity have been noted by Blythe (1979) and more specifically from a social anthropology perspective by Cohen (1994). Both writers noted the extent to which negative social constructions of older people permeated professional practice. In his critical analysis of the way that later life was constructed, Phillipson (1999:2) was concerned that in a postmodern world “we have entered a period of crisis in respect of the identity of elderly people”. This posed dilemmas for both individuals and society. Also, Jarvis (2001) considered that in retirement, the learning of a new identity is the primary task when work roles are shed and new possibilities emerge. The tendency to reminisce is often thought to be a means of justifying past identities and living vicariously through them. However, Bernard (2001:344) in outlining her own biography and reflecting upon issues of identity and biography, argues that “biographising contributes to the maintenance of identity, the presentation of oneself to others and the passing on of key cultural and personal elements”. In a similar vein, Pamphilon (2005) used the life histories of nine older Australian women to explore their perceptions and impact of lifelong and lifewide learning. Lifelong learning was understood as formal learning whereas lifewide learning encompassed all informal learning. Reflecting on life experience was beneficial, and the women actively reconstructed their past rather than merely reiterated it. While schooling was perceived as “real learning” the ability to recognise the value of informal learning and to learn from experience was a “complex interaction between the individual and her culture” (Pamphilon 2005 :297). Identity is not a fixed phenomenon and there may be dissonance between the self that is presented to the world and that which is inwardly felt (Hockey and James 2003). However, a search for coherence and meaning seems important and Cohler (1993) considers that later life is the arena to test that out. Learning and educational experiences in later life can provide the confidence to take charge of one’s life, as the research of Challis (1996) and Aldridge and Lavender (2000) discovered.

In an attempt to celebrate the fact that older people do not want to remain invisible in mainstream society, Wells (2000) in a study from the United States sought to explore the outcomes of an organisation called Continuing Education for Retired Persons (CERP). The primary goals of this field research were to gain a better understanding of what it meant to be an older student, discover

what CERP offered, to determine learning interests and find out how learning was integrated within the participants' lives. Forty members were interviewed and two major themes emerged from the findings. One theme of this ethnographic study dealt with the way that people managed losses through continuing education. Another concerned the cognitive complexity of the group and from content analysis of the transcripts four different types of "intellectual" emerged. They included the credentialed intellectuals who had previous intellectual status, the associative intellectuals who lived up to the lifelong learning ethos, latent intellectuals who discovered education late in life and the spiritual intellectuals who were characterised by their lifelong commitment to learning and intrinsic curiosity. This research raised more questions methodologically than it answered, but it enriched the understanding of the researcher and participants about the meaning of learning and highlights the reciprocal benefits of this kind of systematic inquiry.

The literature in educational gerontology indicates that older people choose to continue learning for many different reasons. As a step towards understanding why so few older people participated in adult education activities after retirement, Walker (2000) reported on a small scale research project to consult potential learners who had just retired about the importance of learning needs within their lives. The Pre-Retirement Association commissioned this work. Two meetings of twenty people in each group were organised. Four main categories of responses were made. Learning was understood as a kind of preventative health activity, for personal development, social purposes and to acquire knowledge and understanding. In the discussion, Walker notes the fact that at public policy level, older people have citizenship rights to more inclusive lifelong learning. She states, "Learning must reclaim and renegotiate its place in the lives of older people, who are themselves seeking to shape a post work identity as the twentieth-century lifestyle of retirement continues to decline" (Walker 2000:312). A powerful point is made about learning being a resource for everyone and that the reasons for engaging in learning in later life are associated with the preventative health and personal development aspects of learning. Again, either implicitly or explicitly the reasons for engaging with learning in later life are associated with maintaining health and a "use it or lose it" attitude towards mental wellbeing. Learning is also associated with quality of life, and is often the means of social interaction by which people can contribute to a constantly changing world.

However, in Brown's (2004) analysis, learning should be fundamentally an emancipatory process in which older people challenge discrimination rather than find the means to accommodate and fit into society.

One of the most impressive contributions in recent years concerning the contribution of older people in shaping policy and practice is the work of the Joseph Rowntree Foundation and in particular the Older People's Steering Group (2004). This four-year research programme about the lives of older people has directly involved older people working with officers, researchers and policy advisors. It focuses upon the priorities which older people themselves defined as important for living well in later life, and twenty-seven projects have emanated from this ambitious project. While none of the projects emphasised learning and education particularly, there were references to learning as important in the lives of older people and, like Withnall, McGivney and Soulsby's (2004) work, revealed that many myths in this respect needed to be quashed. The report has significant transferable issues to the realm of learning, education and lifelong learning policy.

From the outset, the authors uncovered evidence which revealed "the mismatch between what older people want and what policy and practice are delivering" (Older People's Steering Group, Joseph Rowntree Foundation 2004:2). This is a constant message across all public services concerning older people, but in terms of health, one of the key contributions to keeping well in later life was learning. This message is voiced against a back-cloth of polemical views about growing older. One model is of the deficit portrayal of growing older, whereby people lose rights because of their needs for health and social care. The opposite is the heroic model of ageing, whereby success is equated with the ability to compete alongside younger people and surpass them. Both are unhelpful and serve to negate and polarise the reality of older people's lives. There is still a view prevalent in the literature that it is unusual to expect older people to be involved in learning and education. The perceived passivity of older people must be challenged in all realms of knowledge generation, not least in research and it is clear from this report that older people can and do commission research and act as mentors within projects. This report is an important contribution to the literature. Two

representative from Scotland were members of the Steering Group, in which there were proportionally more older people than officers from other agencies which represent older people.

In this final section of the literature review, more empirical work has been chosen which, although small in scale, is combining to offer a view of learning in later life as a contributor to health and wellbeing. There is growing evidence of benefits to health and wellbeing from learning in later life. Also there is some consensus about the reported benefits. Older people choose to learn later for a wide variety of reasons but the gains seem to include increased self-esteem and a stronger sense of self. The dis-benefits are similar to learning at any stage in the life course. As in other areas of this review, the clues to successful learning experiences are negotiation of the learning experience and a reflective approach to life experience and informal learning.

The beginning of this review highlighted the invisibility and marginalisation of older people in policy arenas and in theoretical ideas about the learning society, lifelong learning and ideas of active citizenship. There was also a detectable failure to recognise their contribution towards social capital. Some resonance can be detected between lifelong learning and educational gerontology concerning problems with their remit and generation of theory. Within the selected literature there is a recurrent tension about the nature, aims and purposes of learning and education in later life. A functionalist versus critical paradigm is apparent. In terms of policy, there are “silences” which belie the demographic position, in theory there are polarised positions, but in research and practice there is a growing participatory and collaborative approach. This thesis attempts to contribute to those debates by working closely with a group of older people to jointly explore contemporary lifelong learning policy for its potential impact upon learning possibilities in their lives. Access to their learning stories aims to highlight meanings associated with learning and education throughout the life course, and ultimately a synthesis of the political and the personal domains will be sought.

Chapter 3: Methodology - framing the paths, procedures and processes of the study

Theoretical background

This chapter covers the theoretical underpinnings and practical procedures undertaken in creating and executing this multi-layered study, and Table 1 on page 39 provides a summary of philosophical and theoretical parameters. Sociological ideas about how and where older people are located in society concerning learning and educational opportunity constitute the basis for the thesis. The study rests on the assumption that a relationship exists between political context and personal experience in terms of how opportunities for learning have occurred, how they have developed over the life course and how this group of older people presently experiences them. In this respect a qualitative research strategy that was “inductivist, constructivist and interpretivist” (Bryman 2004:542) was needed to illuminate those issues.

Qualitative research has become a multi-method and multidisciplinary phenomena. Since its inception at the Chicago School in the early 1920s within the discipline of sociology, a diverse collection of methodologies has evolved all with particular assumptions and conventions (Finlay 2000). Although there may be competing traditions, there are also areas of consensus and at heart qualitative research is concerned with interpretation. That process is always viewed as partial, contingent and context bound. Research in this approach finds ways of exploring and revealing intersubjectivity, pursuing depth of analysis and acknowledging complexity. Denzin and Lincoln (2003:13) have used the idea, originally conceptualised by the anthropologist Claude Levi-Strauss of the qualitative researcher as a “*bricoleur*” who assembles and blends methods, theories and findings into a “*bricolage*” of representations about selected phenomena. While the approach permits theoretical flexibility, imagination and creativity, there is an attendant requirement for transparency of decision making and reflexivity on behalf of the researcher. Gubrium and Holstein (2003) discuss the shifting emphasis in social science towards a reflexive exploration of representational practices but the challenge is how to place “authorial voice” alongside the voices of the participants. In light of those research characteristics, exploration in the critical qualitative tradition seemed to have most

purchase on the research focus and research questions for this study. Table 1 provides the warp for this bricolage through which the weft of findings are integrated.

Table 1 Philosophical and theoretical parameters of my study (based upon the structure devised by Denzin and Lincoln 2003)

Ontology	It is based upon relativist ontology. My ontological stance is influenced both by my age as someone now viewed by society as in the Third Age but also as someone with a personal and professional interest in and empathy for people who are 50 plus.
Epistemology	Critical hermeneutics probes beneath participants' narratives to discover possible power dynamics in social relations. Ways of knowing are linked with understanding how ideological processes might dominate and constrain.
Methodology	It is based upon critical hermeneutic, collaborative and dialectical principles. Findings are characterised as emic, which represent emerging and ever changing perspectives about learning and education in later life.
Means of accessing findings	Use of three focus groups with the same group of older people at strategic points in the year, in-depth topic-centred narrative interviews, keeping a reflective diary and continuous reflexivity about process.
Assurance of quality	It involved consideration of trustworthiness, rigour, truth-value, credibility, authenticity and possible bias of findings. An audit trail of decisions taken during analysis is provided in Appendix 4.
Issue of voice	The study respects and directly acknowledges the voices of the participants in the generation and analysis of findings. In addition, an unedited account of the process was written by the participants and is included as a Postscript at the end of the thesis.
Aim of study	To explore the nature, purpose and meaning of learning and education in later life.
Values of the study	The values of the study are linked with social equity and respectfully giving "voice" to older people's perspectives about learning and education in later life.
Informing theoretical positions	Social constructionism and critical hermeneutics provide the basis for analysis of the relationship between growing older and the production of discourses about learning and education in later life.

Critical hermeneutics as the methodology of choice

Critical hermeneutics involves the critique of power relations, uncovering hidden meanings and research as praxis (Lather 1986). I chose a critical hermeneutic approach as the orientating framework to help analyse and understand meanings embedded in the collective and narrative accounts of the participants. Different forms of hermeneutics exist and Thompson (1990) outlines three epistemological stances namely, objective, Gadamerian and critical hermeneutics. Ricoeur (1981) highlighted the essential difference between those hermeneutic traditions as one of faith versus suspicion. Both objective and Gadamerian hermeneutics quest for hidden meanings in the belief that they can ultimately be restored. Critical hermeneutics seeks an understanding of the history of meanings, notes that all social actors are not heard equally and that there is a need to search behind given meanings, which those actors may not be fully aware of (Thompson 1990). This defining feature of probing beneath the surface of participants' narratives to explore possible distortions in social relations related to power and influence led Lopez and Willis (2004:731) to note that this tradition was often referred to as the "hermeneutics of suspicion".

Guiding ideas for my study were transferable from the writings of Thompson (1990) and Lopez and Willis (2004) in nursing, and Kincheloe and McLaren (2003) in research. Their explanations of the approach cover critical interpretation of findings, the conditions within which this understanding emerges and the social and historical dynamics that shape interpretation. All stress the contingent nature of interpretation in social science and emphasise that interpretation is always linguistically problematic with no final informing interpretation. The key sentiment that links their ideas with the intentions of my study is "in its ability to render the personal political, critical hermeneutics provides a methodology for arousing a critical consciousness through the analysis of generative themes of the present era" (Kincheloe and McLaren 2003:450). This raising of critical consciousness is a transactional event and applies in equal measure to me, the participants and any audience for the work. Attempts were made throughout the study to explore what the generative themes concerning learning and education in later life were for this group of people who spanned the third and fourth ages.

The study departs from traditional systematic inquiry in a number of ways. A dialogical and collaborative approach was taken concerning discussion and interpretation of emerging findings and a visual representation of the design and sequence of events from December 2003 until January 2004 can be found in Figure 1 on page 48. Each phase of the study involved dialogue about emergent themes and associated issues. Lifelong learning policy was jointly interpreted and discussed in the first focus group. Joint discussions occurred about the ideas emerging from the narrative interviews, and eventually a joint approach was taken in discussion of any detectable relationship between the political issues within lifelong learning policy and personal experience. I also presented “work in progress” in December 2004 to seek ideas from the group about emerging findings. Finally, the participants worked together to present their own personal views of the process which can be found in the Postscript.

Working together is not an easy or smooth phenomenon, as revealed by Bryne-Armstrong (2001:113) who re-evaluated her research position on collaborative work as a result of tensions created by attempts to attain consensus in findings. Her current view is that collaborative work can be a smoke screen for the exercise of power and “result in colonisation not collaboration”. This amalgam of ideas is ontologically and epistemologically challenging. A postmodern approach to systematic inquiry as described by Gubrium and Holstein (2003) and Cheek and Gough (2005) is attempted whereby I offer opportunities to co-construct knowledge. This approach to research and the generation of knowledge acknowledges multiple realities and the socially constructed nature of that reality. However, I acknowledge that I designed, completed the final analysis and offer this account of the process.

Possible alternatives

Other approaches, which might have informed the aims and purposes of this study included descriptive phenomenology that emanated from Husserl (1970), interpretive phenomenology based on the work of Heidegger or action research as detailed by Winter and Munn-Giddings (2001). All approaches have merit in relation to the research questions but were not selected on theoretical or practical grounds. Descriptive phenomenology deals with subjective experience and may well have

mapped the field of study. Implicit in this approach is the necessity for the researcher to “bracket” or put to one side their own preconceptions when attending to the experience of the participants. Findings in this approach reveal rich descriptions of experience but do not seek underlying explanations. The interpretive tradition does seek meanings, which are located within everyday life, and Heidegger’s belief was that experiences are shaped by the society in which they live. As Lopez and Willis (2004) explain, the important characteristic in this tradition is that of situated freedom and how this influences the choices that participants make. It is an illuminative approach and researchers take interpretations further in commenting upon findings in relation to practice. Both approaches are valuable but do not attend to the degree and range of contextual issues including culture, society or politics and as such would not correspond fully with the aims of the study. The goal of critical hermeneutics is to make the voices of participants heard and to link personal experience with issues of power, justice and equity. Action research shares similar values in terms of collaboration, raises critical awareness and actively works to instigate change and improve practice. Nevertheless, I rejected action research due to logistical problems. After preliminary discussions with the Centre from which I accessed participants, I would not have been able in the time available for this study to negotiate more sustained contact with participants or to work with the open ended nature of the process. A number of other evaluations were on-going and there were concerns about over loading. However, those alternative methodologies remain as possibilities for follow up studies.

My background and factors which influenced the design and execution of the study

Mishler (1986) considered that writing the self into research increases transparency and authenticity. In the same vein, Ezzy (2002:155) wrote “in qualitative research we engage in this self-other nexus to learn more about the other, to hear their voice”. Therefore, in a spirit of reflexive awareness concerning my background, values and belief system, I explicitly acknowledge my potential biases. My background has powerfully shaped my life and values. Also, growing up in rural Perthshire meant that sustained intergenerational contact was the norm in small village life. My work as an occupational therapist in the mid-1970s was involved with older people who had mental health problems. Since 1987, as an educator, later life was always within my teaching remit and I have served and continue to serve on various national and international committees as an advocate for people over the age of fifty. My involvement with the Royal Bank of Scotland Centre for the Older

Person's Agenda began in the mid 1990s as part of the original working group responsible for planning the Centre. More recently, I have been involved as a consultant/facilitator for one part of a course called Education for Participation. As its title suggests, this has an emancipatory ethos and strives to work in partnership with older people to raise their profile in society. This philosophy is one that I share, and I have run four courses to date. It is from this population that the participants of this research were drawn. I therefore do not enter this inquiry process without underlying assumptions about older people and the place that they occupy in contemporary society.

Participants in the study

I approached the staff at the Centre in 2003 to discuss my study and to request help with identification of a possible sample group. My criterion were that those identified should be able to travel to a central location, were comfortable about group work and had preferably attended the brief course on reading policy documents in previous courses. They subsequently identified a purposeful sample of fifteen possible participants. Ezzy (2002) considers that the term purposeful should be used to describe such a group because the term resonates with the aims and objectives of a study, rather than the notion of a convenience sample. I contacted those individuals by telephone to enquire about their potential interest in this study and to ensure that they were not saturated by other involvement either in the Centre or in other activities associated with the "older people's movement". Five people were in that position and declined at this early stage.

In November 2003, invitations together with an information sheet and an informed consent sheet were sent to ten people who had previously undertaken the course entitled Education for Participation at Queen Margaret University College in either 2002 or 2003. I knew those participants through my involvement with the Centre but members of the group did not necessarily know one another. They were invited to a briefing event in December 2003 at which time the study was described and there was an opportunity to ask questions or clarify issues. An outline of the study and the shortened version of the policy *Life Through Learning Through Life* (2003) as described in Chapter 1, were distributed at this time. I had chosen this policy because it was the most recent lifelong learning policy in Scotland and I wished to use it both to establish a macro context for the study, but also for

use as a method to gain collective perceptions within a focus group. The shortened version provided a manageable summary of the policy. Participants could either complete the consent slip in the briefing group or take the materials home. A request was made to return the forms within a fortnight. Six participants came from the locality, two from the west of Scotland and two from Fife.

The briefing event allowed participants to get to know one another and to form as a group. Within one week, nine participants had agreed to take part and the following week the tenth person signed up. Unfortunately, another person who had attended the briefing session had to withdraw from the study due to poor health. I did not make any attempt to recruit another participant at this point because the group had already formed. There were requests from three of the participants to receive notes from the presentation of the study and to access the full version of the policy as well as the summary version. Letters of thanks, reimbursement of travelling expenses and a copy of the presentation were sent to all nine participants before the end of 2003. I began a reflective diary at this time, which was subsequently analysed to explore unfolding dynamics and processes within the experience.

No claims are made that this group of participants were representative of older people per se. They are a group who have had the confidence and initiative to access various learning opportunities in the past and have all attended the Education for Participation course, which seeks to raise consciousness about partnership working and how to make their voices heard (Dewar 2003). They are interested in and articulate about the topic of learning and education in later life and are all involved to some extent in activities that resonate with the “older people’s movement”, as outlined by Glendenning (2000:1). Nonetheless, they are diverse in terms of their backgrounds, past educational experiences, life experience, and current confidence in their individual opinions. This group feel strongly that they are “representative of themselves” and share the view that they are part of a growing movement of older people who are becoming more assertive and able to advocate for others. Individual profiles of each participant can be found in Appendix 1 and a composite profile of the nine participants can be found in Appendix 2.

Ethical processes

Ethical approval was sought from the Ethics Committees of Edinburgh University and Queen Margaret University College in October 2003. Approval to proceed without representation at a formal ethics committee was granted by Queen Margaret University College in November 2003. Informed consent was the key issue in the study because the ten participants were not matriculated students but volunteers for short courses offered by the then named Centre for the Promotion of the Older Person's Agenda at Queen Margaret University College in 2002 and 2003. Ethical issues concerning confidentiality were explained at the briefing session and a further two weeks was given for participants to consider the issues and potential involvement in the study before returning the consent slip. In this case, current research governance rules did not apply but this did not detract from the care taken in the induction procedure. Permission to access the participants was granted by the Director of the Centre and close contact was maintained with the unit throughout. This included involvement of one member of the Centre as a scribe in the focus groups, induction of a new member of the Centre staff in November 2004 in the focus group and I gave a presentation to the staff of work in progress in January 2005.

Respectful use of data was one issue in this study because of the ease with which participants or staff of the Centre could identify each other. Ground rules of respecting anonymity and confidentiality were established in the briefing session. When I discovered that I would not have the time to transcribe tapes from the focus groups or interviews myself, I recruited an experienced typist who knew about ethical implications. I informed the group verbally about this at the beginning of the first focus group and thereafter at the beginning of the next two groups. No questions or dissent from the group occurred. It was agreed that all tapes should be returned to the respective participants at the end of the study. Participants were anonymised in transcripts and in subsequent findings. All transcripts and tapes were kept in secure cabinets.

Transcripts of the topic-centred narratives were sent to individuals for member checking of accuracy and meaning. Time pressures precluded sending the focus group transcripts to each member for checking. The only other person to see the transcripts was the member of staff from the Centre who

took notes during the focus groups and who independently allocated analytical categories to the focus group transcripts as part of the research process. The group was made aware that quotes from the focus groups or interviews would be used in the study to support my analyses. Nevertheless, I acknowledge that they would not know the specific context in which their words might be used within the thesis.

Another ethical issue concerns the interview encounter and the intimacy that an in-depth exchange can create. This was evident in three interviews where participants became distressed by their recollections of schooling or other life events from which they considered that important informal learning had occurred for them. Both Reissman (1993) and Day Sclater (1998) have commented upon the cathartic effect of exclusive listening and specific focus upon the personal experiences of participants within their respective studies. This is not a situation of therapy but nevertheless ethical issues prevail about how emotions are dealt with within the interviews and how they are transcribed. The opportunity to cease recording was always given and two members within their interviews accepted to do this.

Preparatory work

As part of the project proposal in July 2003, I carried out one topic-centred narrative interview with one of the nine older people in the group to explore the nature and viability of this type of interview. While successful in accessing a broad appreciation of how learning and education had influenced this person's life, the exercise revealed that I was asking too many questions and giving insufficient opportunity for creative responses. This exercise shaped the design of the subsequent interview schedule and helped me to reflect upon the nature of the dialogue within such an encounter. I also gained insight into the practical issues involved in analysis of twenty-five pages of transcript. As a result of this exercise, I designed an interview schedule that covered background information about learning and education in the first section. This had a dual purpose in allowing a settling time for the participants and enabling me to build a profile of the participant prior to exploring actual narrative material. In the second section, I provided the chance for creative responses in choosing a title to describe their learning and educational lives as if choosing the title for a book. This acted as the

bridge between the first and second section. The concluding part of the schedule was concerned with questions about learning and education in later life.

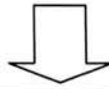
Conceiving the design and sequence of the research

To fulfil the research aims and objectives I considered it necessary to design a study that allowed an appropriate timescale within which to deliberate upon meanings, consider emerging analysis and synthesise findings from collective and personal exchanges. Involvement over the year allowed the opportunity to revisit and reframe ideas. It also seemed important to allow sufficient time to explain and debate my initial proposal with the group and in particular to provide a forum to debrief participants from an experience in which they had revealed personal feelings and experiences. Figure 1 on page 48, visually outlines the key phases of the research together with the time taken for different phases and levels of analysis. As the figure conveys, the process was dialogical and culminated in an unedited Postscript written by the participants.

Fig 1 Design of the study and the sequence of events Dec 2003 – Jan 2005

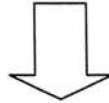
8th Dec 2003

Briefing event

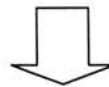
**Phase 1**27th Feb 2004

First focus group meeting

Focus - Perceptions about the summary version of
Life Through Learning Through life (2003)

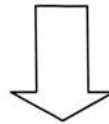
March – July 2004

In-depth interviews with nine participants to collect learning stories
Preliminary analysis to feed into the second focus group meeting

**Phase 2**5th Aug 2004

Second focus group meeting

Focus - Meaning of the learning stories to the nine participants

Sept – Oct 2004

Thematic narrative analysis of learning stories to feed into third focus group meeting
(Labovian analysis was carried out later in the Spring of 2005)

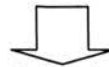
Phase 318th Nov 2004

Third focus group meeting

Focus - Synthesis of personal and political perspectives

Dec 2004

Debriefing event



Postscript from participants (January 2005)

Methods selected to gather findings

Focus groups as a research method with older people

Focus groups were chosen as a method of collecting findings for three main reasons.

- Little is known about the meaning of learning and education in the lives of older people or how older people view lifelong learning. A collective exploration of this with an informed group of participants had explanatory potential.
- The interpersonal experience and interaction of views about this topic would add a stronger participants' "voice" to the findings
- The focus groups would provide a place to extend and develop the ideas that emerged over the year-long inquiry period.

Focus groups are organised to explore a particular topic determined by the researcher (Morgan 1988, Sims 1998, Cronin 2003, Bryman 2004). In contrast to the breadth of possible coverage in a group interview, a focus group directs attention to one area and explores it in depth. As with all group work, the common misconception is that it has economic advantages of seeing more people at the same time. Rather, it is the method of choice when reciprocity, group dynamics and exploration of group processes is the intention. Any analysis should resonate with the aims, purposes and methodological approach of the study in question. However, Kitzinger (1994) and Duggleby (2005) comment that analyses from focus groups frequently omit the patterns of group interaction. In Kitzinger's research concerning AIDS in the mass media, she outlines two key communication patterns that emerged in focus groups. Complementary interaction occurred when cohesion seemed to be present in the group and members followed up responses and held a theme consistently over time. By contrast, argumentative communication revealed dissent and difference with a poorer group spirit. However, this could mean that the group were secure enough to tolerate disagreement and were beginning to test boundaries (Baron and Kerr 2003). Each group reaction requires responses from the researcher/leader of the group, who can facilitate or constrain progress. However, while the designated leader does have responsibility to facilitate cohesion within the group, they do not have the sole responsibility. The group is an entity in its own right. As Barber and Schostak (2005) explain, once formed a focus group quickly establishes norms, culture and idiosyncratic dynamics.

The key advantages of focus groups which authors such as Stewart and Shahdasani (1990), Cronin (2003), Bryman (2004) and Barbour and Somekh (2005) all note, include the potential to generate new ideas using the collective experience as a research instrument. The group is the unit of analysis and this enables participants as well as the researcher to explore why individuals react as they do. A group that shares a particular interest in a topic can produce richer and deeper insights. This enables the researcher to understand the ways in which participants collectively construct meaning.

Nevertheless, there are attendant challenges concerning power, control over the process and authority to determine research questions, which requires reflexive attention on the part of the researcher.

Sims (1998), Duggleby (2005) and Barbour and Schostak (2005) draw attention to the complex issue of analysis of transcripts which can be complicated by themes of consensus and dissent, strength of opinions and the fact that generalisations are more theoretical than empirical. Additionally, group effects and the impact of pairings within groups, dominant members and the possibility of scapegoating, present a leadership challenge for the researcher (Sarantokos 2005).

There may be instances where the reactions of participants within a group are quite different from those within an individual interview. In this study, one of the most striking differences was the increased level of emotion within individual interviews. While expressions of indignation, incredulity and resignation could be detected from the group transcripts, the level of personal hurt, regret or affinity experienced by key individuals was reserved for individual sessions. Some of the other challenges of focus groups surround the issue of non-representative samples, which is openly acknowledged within this study, and interviewer bias. Additionally, striking a balance between encouraging interaction and holding to the task of the research agenda can be problematic. Finally, confidentiality needs to be constantly reiterated as an important issue in focus group meetings.

I decided to hold three focus group meetings with the same participants at strategic points within the study. The meetings acted as a collective conduit for emerging and developing perceptions about learning and education in later life. Members reported their enjoyment at meeting and working with peers which highlights the importance of the social nature of a group event.

Narrative

The central methodological theme in this study is narrative. Narratives are stories that people tell about their lives, and they are especially useful for studying transitions or turning points. They are interpretations of events and are invested with meaning/s. A strong temporal theme is present in most narratives as the past, present and future are linked (Reissman 1993). As Polkinghorne (1991:136) noted “it gives meaning to temporal events by identifying them as parts of a plot”. However, narrative linearity has been challenged by Leach (2004) who, writing in relation to her own ageing, interprets this as a particularly Western convention and suggests that stories can move in many directions.

I chose narrative interviews as a method for this study for the following reasons:

- The literature in educational gerontology did not contain many examples of older people’s own stories about learning and education throughout their lives and I was interested in possible links between earlier experiences and present involvement with learning
- I wanted to explore social influences upon their learning and educational trajectories
- I wanted to understand the meanings that were invested in the ideas of learning and education

Stories emerged from the focus groups, the interviews, my own reflective notes and indeed this final thesis. Policy can also be treated as conveying particular narratives, as suggested by Ozga (2000).

When considered together, those narratives have the potential to offer a glimpse into the experience of older people concerning learning and education and this particular aspect of their social world.

Narrative research has had an impact upon the qualitative research paradigm through the work of key writers such as Ricoeur (1980), Mishler (1986), Polkinghorne (1988), Cortazzi (1993), and Reissman (1993). It can be located within different theoretical perspectives in qualitative research.

However, narrative analysis remains the research component that most writers believe to be problematic. To clarify the differences between approaches, Mishler (1995:90) proposed a typology of models, which offered three different possibilities for the task of narrative research. This included types of analyses that accentuate “connectedness and temporal ordering” which give narrative its distinctiveness as one type of discourse. Textual coherence and structure was the next category which tended to focus upon language and the way that sociolinguists analyse units of speech within

narrative. Finally, narrative functions focus on the purposes of narratives for the teller, the listener and wider communities of listeners. While typologies can be restrictive, this outline reveals the depth and variety of approaches within the use of narrative methods in research. It served to simplify the process of analysis in this study.

Reissman's (1993) work on narrative analysis has become seminal for any study involving storied approaches to social inquiry. She also acknowledges that narrative resists being firmly located within any one paradigmatic or theoretical field. Her approach to narrative analysis focuses upon story, how it is constructed, the language used and how it persuades the reader and audiences of the veracity of that story. This "turn to narrative" (Mishler 1995:117) is at the heart of the shift in research practice from contrived interview to storied accounts. This is evident in the work of Gubrium and Holstein (2003), Polkinghorne (1988), Reissman (1993) and Ebrén (1998) who all recognise the links between narrative structures, identity and personal development.

The second phase of the study constituted a collection of descriptive narratives according to the definition of Polkinghorne (1988). They were topic-centred and focused on the meanings of learning and education for the group of nine participants. Specific reference was made to learning and educational experience over the life span and particularly in the recent past. "Language is understood as deeply constitutive of reality" according to Reissman (1993:4), and the transcribed focus groups and individual topic-centred narratives were analysed for how they were constructed, what inherent assumptions existed, omissions in the stories, rhetorical devices and key influences. In the context of this study, the idea of narrative structure is a particularly pertinent one. For this reason I chose Labov and Waletzky (1967) and Labov's (1977) sociolinguistic approach as a method to explore the structure of the narratives in relation to their social function. It formed a micro-approach to analysis of narratives and involved identifying a number of elements within the narrative structure, namely the abstract, orientation, complication, evaluation, result and coda. Elements are explained in Appendix 7. Cortazzi (1993) used this approach in the study of teacher's narratives and called Labov's approach an evaluation model. As Coffey and Aitkinson (1996) contend, the advantage of this approach is in appreciating how the structural units helps us to think about findings in order to achieve a more sociological analysis. Linde (1993:68) also considered that this approach provided a

useful template from which to study naturally occurring talk; however, she pointed out that there are two inherent assumptions. One concerned the assumed “factuality of events” and the other relates to “narrative presupposition” by which she means that the order of narrative clauses mirrors the order of events in the real world. In this study, I was interested in how the participants presented their story in particular ways to make particular points and as such it constitutes a strength of my mode of exploration.

Clouston (2003:140) reveals that there are pitfalls in the aim to “empower the narrator” because the writer’s account offers a particular slant on events, which may not be truly representative, nor indeed empower the group or interviewee in question. Other limitations of narrative analysis include the problematic issue of narrative truth and how that can be ratified. Spence (1982) tackled this issue in terms of a distinction between narrative truth and historical truth. Essentially this argument rests with the individual narrative construction of lives and the emphasis is on the important inherent meanings for them. Unquestionably, storied lives depend upon recall and interpretation of the past but, this is also concerned with the future and how that is constructed within the imagination and anticipation of the individual. The difficulty of maintaining sufficient distance to be critically analytical and reflective about the emerging processes is frequently cited as challenging. Day Sclater (1998:85) also adds a cautionary note concerning “the failure of narrative approaches to account for the production of subjectivity in the process of narrative accounting”. Her psychodynamic perspective concerns the issue of unconscious processes and how to locate the participant if the narrative is viewed as jointly produced. As a method of inquiry, narrative analysis is not suitable for large studies because of the time consuming nature of the procedures and the necessity for “thick description”. Likewise, generalisation is not advisable but a study using narrative can act as the stimulus for other work beyond the explorative stage.

Researcher reflexivity

While I required skills of attending, listening, reflecting and interpreting, reflexivity was an attendant necessity and it was part of the analysis of findings. Finlay (2002:532) has described this phenomenon as “continual evaluation of subjective responses, intersubjective dynamics and the

research process itself'. It was necessary to examine how I interpreted meanings and how my position and experience shaped the analysis. Banister et al (1994:147) describe reflexivity as the "most distinctive feature of qualitative research". Drawing on the role of reflexivity in feminist psychology, Wilkinson (1988) subdivides the concept of reflexivity into personal, functional and disciplinary components. Personal reflexivity is required to openly reveal interests, values and sources of connection with the material being studied. It can be a complex juggling procedure to maintain boundaries and may require a third party in the form of a mentor. In this study, regular thesis supervision and peer review in the thesis workshops acted as checks and balances for the work. Functional reflexivity according to Wilkinson is more concerned with the usefulness of the chosen research methods and their ontological and epistemological assumptions. All findings are constituents of a particular reality and transparency is required to allow readers the opportunity to perceive how a set of findings has arisen. In this study this was attempted by the use of personal reflections on all encounters within a reflective diary. Finally, Wilkinson (1988) adds the final part of this trilogy of reflexivity and calls it disciplinary reflexivity whereby wider issues of the discipline of social science are considered. In relation to this, Pyett (2003) retains the idea of validity in relation to qualitative research and offers the belief that readers and particularly the consumers of research should provide reality checks of the findings. In this study the focus groups allowed the participants to directly comment upon, criticise and reconstruct my initial findings. In addition, the final Postscript provides the ultimate "reality check" concerning the participants' reaction to the year-long process. Other means by which a systematic and transparent approach to the study was carried out are summarised in Table 2 on page 55, concerning how trustworthiness and rigour was attempted based upon the format provided by Hammell, Carpenter and Dyke (2000).

Table 2 Means of striving for trustworthiness and rigour

Authenticity	Through the checking of transcripts by participants and monitoring of emerging findings within two focus groups. There was also a debriefing presentation of work in progress in December 2004.
Trustworthiness	Through the use of different approaches to collect findings about learning and education in later life over a sustained period of time. This included literature searches, focus groups, in-depth topic centred narrative interviews and researcher reflexivity
Plausibility	Ensuring that the “voice” of the participants is heard and accurately represented in the findings together with an unedited account of the process written by the participants and found at the end of the study in a Postscript.
Credibility	Transparency of findings and how they were interpreted through provision of an audit trail Appendix 4
Reciprocity	Collective negotiation of meanings within the focus groups
Peer review	Presentations at three thesis workshops held with Ed D students at the University of Edinburgh as part of doctoral studies, a work in progress presentation to the RBS Centre for the Older Person’s Agenda, discussions with supervisor and peer discussion.

Analysis of findings

The *bricolage* created through analysis of the collection, interpretation and representation of this research process sustained many revisions, as material was reworked in the light of new material or new insights. Shacklock and Thorp (2005:160) describe “learning *to be with* stories” and exploring the most culturally acceptable method for collecting and dealing with findings. This iterative process is a feature of qualitative research and when analysed through the lens of critical hermeneutics, the task is to explore covert but powerful messages. As Chase (1996:55) explains, the intention is not to challenge meanings attributed by participants but to “understand how it is communicated within or against specific cultural discourses and through specific narrative strategies and linguistic practices”. In an attempt to make my thinking and decision-making transparent, an audit trail of my decision making is provided in Appendix 4 and examples of how categories were melded into themes is found in Appendices 5 and 6.

The choices that I made for the thematic and sociolinguistic analysis of collective and narrative findings resulted from attempts to link the research questions, aims and objectives with the approaches that had explanatory power. Approaches that I rejected included the biographical interpretative method (Wengraf 2001) on the grounds that the detailed analysis required specialised training. I also considered an approach which has been adapted from that called the free association narrative interview and analysis considering the concept of the “defended subject” (Hollway and Jefferson 2000:4). Although I was sympathetic to the psychodynamic underpinning of this approach it did not capture the nature of social relations that I required. Computerised analytical approaches such as NUD.IST were also rejected because although it would have helped with the organisation of content, it would not have assisted with the subtleties of exploring and analysing meaning.

Although the study is characterised by dialogical processes and a co-operative partnership approach ultimately the analysis of findings and the final thesis is my responsibility. A number of writers including Finlay (2002), Denzin and Lincoln (2003), and Mantzoukas (2004) highlight the centrality of the researcher in qualitative inquiry concerning representation. While not abdicating this responsibility, I want to extend the metaphor of the *bricolage* by suggesting that I created the warp in

terms of the design, structure and processes. However, participants through their participation in the process have contributed to the weft (conceived as the findings, analysis and discussion) of the unfolding *bricolage*. Mantzoukas (2004) extends the argument however by suggesting that in terms of analysis of findings, the researcher in this tradition has to signpost a route for subsequent readers of the research who act as both audience and fellow interpreters.

Strengths of this multi-layered approach to the study of learning and education in later life include the opportunity to capture the relationship between political context and personal perceptions and experiences. Policy affects older people in many different areas of their lives, and the possibility to gain insight into the storied accounts of learning and education for people aged 65 plus offered a social commentary on the learning trajectories of people who are now in retirement. How that learning was shaped and continues to be shaped by macro-level influences of socio-economic and educational policy together with contemporary practice became evident.

Demerits of a multi-layered and multi-faceted approach to systematic inquiry such as this include:

- potential interparadigmatic clashes concerning the nature of interpretation and representation
- issues in the nature and practice of collaborative activity
- perceived tokenistic gestures of debate and inclusion of older people within the study
- dealing with the sheer amount of material that the work generates and issues about selection.
- complexities of analysis and synthesis with few existing taxonomies or guidelines
- the necessity for transparency of interpretation and findings also posed a challenge because it is easier to record procedures than the thinking processes involved in abstracting material into categories or themes.

In essence, those issues relate to qualitative research generally and the complexities of representing feelings and perceptions which are dynamic and relative in an authentic and respectful manner.

Creativity in design and analysis needs to be accountable and transparent to any audience. But the “story” is never complete and requires a tentative “research humility”, as explained by Kincheloe and McLaren (1994:151), to resist premature or artificial foreclosure of the analytical process.

Chapter 4: Findings - representation of the experience through group, individual and personal perspectives

“Representation does not reflect, it creates” Czarniawska (2004:118)

This chapter is structured in four inter-related sections. Analysis commences with identification of key group themes from the three focus groups using the group as the primary unit of analysis (Sim 1998, Kitzinger 1994). Each group will be discussed in turn to reveal particular preoccupations at different times in the study and how the identity of the group developed over the year. Following this account of collective themes, narrative analysis of individual learning and educational stories is undertaken firstly by identifying analytical categories and subsequent themes and then using Labovian analysis as a heuristic device to highlight participants’ interpretations of selected narrative sequences. In the latter type of analysis, the structure of the selected narrative is explored and meanings are revealed in the way that the participant evaluates key issues. While resonance with group themes occurs as revealed in Fig. 2, page 105, the narrative analysis process is by nature more individualised, personal and contextual. The third analysis of findings is concerned with attention to and interpretation of the research process. Finally, in accordance with the spirit of the study and acknowledgement of complex representation issues (Mantzoukas 2004), I reflexively locate myself within the inquiry process to illustrate intra-subjective and inter-subjective processes, which have a bearing upon the nature of the analysis and interpretations.

An audit of decisions involved in the analytical process of focus groups and narratives is provided in Appendix 4. In analysis of the focus groups, specific attention was paid to group interaction and to where the majority of participants were involved either in complementary, argumentative or differentiated types of communication about a topic concerning learning and education in later life within the group. This is found in Appendix 5. I added the idea of differentiated communication, which adhered to those two communication possibilities but augmented personal meanings in terms of context, example or degree of agreement or disagreement. A multiplicity of voices illustrates and illuminates this account, and my intention is to represent them as faithfully as possible using direct quotes taken from appropriate contexts (Gilgun 2005). The chapter also corresponds to the first two aspects of the hermeneutic triad as described by Hernadi (1987). In successive readings of the focus

group transcripts I strove to explicate what the transcripts said about learning and education in later life through the identification of analytical categories. Then I attempted to understand and explain emergent issues through the grouping of categories into overarching group themes. In Chapter 5, I explain and construct what I think the findings mean in context and explore resonance between policy and personal narratives.

Section 1 Findings from focus groups

In this first section, the focus is on thematic analysis of content rather than process. The three over-arching group themes about learning and education in later life characterising the three phases of the study seem to move in a developmental direction as shown in Table 3.

Table 3 Outline of focus groups and respective themes

Phase	Date	Focus Group Meetings	Group Theme
1	February 2004	Focus – Impact of <i>Life Through Learning Through Life</i> (2003) (nine participants present)	“Exclusion”
2	August 2004	Focus – The meaning of learning and educational stories (six participants present)	“Taking stock”
3	November 2004	Focus – Possible links between political and personal issues (nine participants present)	“Moving on”

Phase 1 First focus group meeting - group theme “exclusion”

Contrary to the sentiments evoked by the title and the expressed intentions of *Life Through Learning Through life* (2003) concerning active citizenship and social inclusion, the over-arching theme from discussion in the first focus group in Phase 1 was exclusion of older people from this political agenda. Exclusion was felt acutely both personally and collectively and over the course of the first focus group, this feeling extended from a learning and educational context to a societal context. Whilst, paradoxically, it provided the shared norm from which to unite and coalesce a sense of group identity,

the individual impact of exclusion was sustained throughout the year. The most evocative phrase in the Postscript about exclusion is “I felt rejection when I read and re-read this policy”, which personalises the experience and reveals that this individual revisited the policy.

Sub-theme 1 Exclusion on the basis of economics

The mood of this first group was purposeful and three participants brought notes, all participants brought the summary version of the policy and two had accessed the full version of the policy. Two members explained that they had sought out other policies on learning or community planning to understand how *Life Through Learning Through Life* (2003) corresponded with the wider political agenda. So, this was a group who took the task seriously, wished to be as informed as possible and had come prepared for dialogue and debate. The opening section of the focus group immediately identified a *sense of exclusion on the basis of economics* because older people were no longer in the job market. However, the pattern of continuous interaction between five participants within the first ten minutes of the group reflected both complementary and argumentative communication about this issue, for example in lines 10 – 30 of the focus group transcript:

Participant 1 (Line/s) L.10-12 “its not about lifelong learning – it seems to stop at thirty.....to plug the skills gap.....it’s economicsabout getting people back to work. No mention of older people or of primary school”

Participant 3 L.13 “I think it’s a chunk taken out of life in total”

Participant 2 L.15 “it’s purely the economic factor of life”

Participant 3 L.20 – 22 “and I think this business ofehm, learning, learning, learningand it’s all universityit’s only a piece of camouflage to keep down the unemployment levels”

Participant 8 L.27 – 30 “I think to say the emphasis is on the economic aspect is stating the obvious, as far as I’m concerned, it’s so obvious that the references to anything other than that are few and far between, they do mention social outcomesbut they don’t say the “how” or the “why”

The point here is that this group was cohesive enough to tolerate differentiated responses to an issue that caused concern.

Sub-theme 2 Exclusion on the basis of age

This was immediately followed by a wider sense of *exclusion on the basis of age* with strong descriptive metaphors used: “I mean its as if we’re in the scrap heap” (Participant 8; L.37) and “at sixty four, you may as well fall off your perch!” (Participant 2; L.38). Other participants nodded and agreed with those sentiments and the verbal exchanges included Participant 7 who was not an active participant but followed the group discussion carefully, thus enabling her to interject at this point with a humorous quip which caused laughter and a shared dynamic within the group. This concerned a media response to negativity about older people and specifically an example of a ninety-year old woman who had taken a year out of a university course to visit Australia. The group considered that while this was positive, she must have been self funding and the sub-theme was *exclusion on the basis of financial privilege and inequality of opportunity* which led to the following quip: “this will be her second gap year!” (Participant 7; L.50). Opportunities that did exist for older people to pursue educational opportunities such as the Ransacker’s Project in Scotland had not materialised because of lack of publicity and lack of funding from the Scottish Executive. The group shared a profound sense of ageist prejudice and discrimination in this respect, concomitant with the work of Bytheway (1995).

Almost as a reaction to this perceived sense of exclusion from educational opportunities and from society in the present, the group began to reminisce about their earlier learning lives. Night school had been free, apprenticeships had been available and the group empathised with the current plight of young people. For example: “when I think of the free things that I got after the leaving the army, I shudder to think about what students have to put up with nowadays, there is no incentive to study” (Participant 4; L’s 173-175). Possible tensions between generations were considered in light of the notion that older people were perceived as more efficient and dependable than younger people in situations where they were attracted back into the workforce. Participant 8 was particularly aware of this emphasis on: “the demographic time bomb” (L.223) and the media effect that this has on the rest of society. In effect, the dominant discourse elicited by the group was that older people were to be treated with dismay, or disquiet, or ignored, which directed the attention in the group back to the way that the summary version of *Life Through Learning Through Life* (2003) was presented.

Sub-theme 3 Exclusion on the basis of presentation of the policy

Individuals had carried out a careful analysis of the summary version and they were keen to share their reactions to it within this group. *Exclusion on the basis of presentation* was perceived: for example, Participant 2 considered that “you needed to be a Philadelphia lawyer to interpret it” (Participant 2; L’s 312-3). It was, “also printed on the right colour of paper.....black!” (Participant 3; L’s. 256-7) in relation to older people. A stream of continuous and complementary communication about the perceived presentation faults in the summary version emerged at this point in the group, for example:

Participant 4 L.259 “that’s another thing, it’s a very poorly designed document”

Participant 9 L.261 “you can’t read it”

SB L’s 265 – 274 (At this point offering an overview of the design, use of colour, the vision and the content of the policy)

Participant 5 L.275 “ beautiful generalisations.....it can mean almost anything”

Participant 1 L.276 “I agree, it’s meaningless”

Participant 3 L.280 “I back you up there, its language, language, language and no goal at the end”

Participant 1 L.282 “There’s nothing practical here”

This group felt exclusion acutely because there was no specific mention of older people in the summary version, for example:

Participant 8 L.288 “if they really mean the fifth part, which says “irrespective of backgrounds”

SB.....L289 ”Mmmm, yes”

Participant 8 L.290 “and personal circumstances, they mean us..... but they don’t do they?”

This developed into a discussion about accountability and whose responsibility it was to translate the vision into practicalities. Consideration ensued of the civil servants who may have written documents of this nature and what the consultation process had been. The group at this point

maintained unity by collective criticism of this document in terms of design, contents and lack of consultation with older people. While *exclusion from the ethos and nature of lifelong learning policy* remained the central theme of the group, they considered that the policy was about “learning for earning” and this led into a connected theme about what learning in later life was for.

According to this group, learning in later life adhered to liberal education principles of personal growth, interest and: “the discipline of being able to organise my intellectual life” (Participant 8; L.’s 451-2). It was not about “looking for more degrees, or pieces of paper to hang on the walls” according to (Participant 5; L.433). The social aspect of learning was considered to be vital and value-added issues had not been sufficiently included in current policy. Values about learning within the policy, as perceived by the group, were merely instrumental and strategic. One solution of “up-skilling” older people and enabling them to participate in modern society had been information technology and this created a ten-minute discussion about the merits and demerits of the “silver surfer” phenomenon. The group was balanced in their view about the potential of computers and felt that the problem revolved around their experience of poor training, lack of privacy and accessibility. *Exclusion on the basis of poor teaching* underpinned the demerits of information technology, although Participant 2 stressed it that this could be part of the answer to learning and education in later life.

The concluding section of this focus group meeting was characterised by ambivalence about collective identity, which is highlighted in the following section of continuous communication in the group:

Sub-theme 4 Who is excluding whom?

Participant 2 L’s 666-7 “I just feel for older people, first off all there isn’t any value, they’re not valued because by the very nature, you’re excluded”

SB L.669 “So, high in number and low in influence?”

Participant 2 L’s 669 – 672 “and in fact, today very much the media is compounding that all the time, you’re either in hospital holding a bed up, they want to get you out and there is nothing at this present moment to make you feel that growing old is exciting or attractive”

Participant 8 L.673 “and they keep talking about the contribution to society, but they’re not doing anything about it”

Participant 6 L.675 “We are actually living too long”

I selected this section of group communication because it reveals how participants began to distance themselves from the rest of older people. Ambivalence concerning “them and us” and the identification of “they” is registered. This seemed to evoke the comment: “Sheena, they do say here - there are important roles to the individual, and what it comes down to is - you need to look after number one - yourself and that’s it!” (Participant 5; L.632). In effect, this is what this group has done, they have sought out opportunities and taken individual responsibility for their continued learning and education. As this first focus group drew to an end, examples of possible intergenerational contributions were revisited, ranging between attending schools as a mentor or teacher to becoming a living historian. However, some resurgence of pessimism about the place of older people in society reoccurred:

Participant 1 L’s 745-6 “we seem to be in an invisible area, anyone who is fifty-five up is almost in an invisible area”

Participant 8 L’s 748-50 “I think those documents – either they reflect or they are reflected in the local situation because there doesn’t seem to be anybody taking cognisance of this generation”

However, a most interesting dynamic occurred in the final minutes of the group, where Participant 2 seemed to react to the pessimistic tone of the group and sought positive closure for everyone with the final comment: “I would just like to say one thing, that the power is in the people and the power is in the majority, and what we have to do is to get older people interested. There is a fantastic amount – to take away apathy and to do something that will make not just us but a lot of other people interested” (Participant 2; L’s 754-58).

Here this participant re-connects this group with other older people in society and speaks with a sense of personal and collective agency. Recognition of social relations and power issues within policy and

society were clearly felt and articulated. Using the summary version of the policy as a means of establishing context for the research had resulted in this group viewing the policy as a microcosm of society. Nevertheless, while exclusion may have been the most pervasive theme in response to the policy, the group acted as a container and means to ventilate feelings about this disturbing phenomenon before any solutions could be considered. The group had provided a venue and forum for a sense of collective deliberation and action. Collectively, they had held to task and the note taker (F'O'M. from the RBS Centre), commented that "the group seemed comfortable with one another and happy to challenge views and comments".

Phase 2 Second focus group - group theme "taking stock"

The title for this over-arching theme was chosen for a number of reasons. I had *taken stock* of the content about learning and education stories of the nine transcripts prior to the second focus group, and through a process of constant comparison of analytical categories in the learning and educational stories had produced six core narratives, which were shared by all participants. They were:

- Narratives of contribution (principally voluntary work)
- Narratives of adaptability (rising to the challenges of life transitions)
- Narratives of continuity (learning continuities such as love of reading)
- Unsettling narratives (caused by life events principally retirement)
- Narratives about the meaning of learning (evaluations about particular situations)
- Validating narratives (sense of achievement through different kinds of learning)

My initial analysis was offered to each participant in the invitation letter along with the combined profile of the participants and the titles of their learning stories to be discussed within the second group. This dialogical process was part of the collaborative approach taken to the research (see Chapter 3). It provided a continuity mechanism from the first focus group and provided the initial discussion points for the second group. Equally, participants had *taken stock* of their own transcript by member checking and the process of that is reported in the third section of this chapter. Finally, the transcript of the second focus group revealed collective themes about *taking stock* of early

educational experiences, responses to retirement, learning in later life and the future. There was also evidence of a wish to *take stock* of the development of this particular group experience whereby Participant 1 volunteered to take the titles given by participants for their learning and educational stories and compile a composite title for this emerging group story.

The group acknowledged my eliciting of six types of narrative. In particular the theme of continuity was immediately recognised by Participant 1 who considered that on reflection her story was (L91 “heroic”) and as such it was a validating experience for her. Also, it was considered that the theme of contribution may not continue because: “It did occur to me when I read it, that none of my children have done any voluntary work such as I did when I was young, which is a pity”(Participant 4; L’s123-4). A validating narrative was recognised: “there had been a lot of privileged people who had gone through – they were not here – we’re here!”(Participant 9; L’s125-6). From the recognition and validation of three collective narratives which I had drawn from the nine learning and educational stories, the group progressed to the first key theme, which was concerned with *taking stock of their own early learning experiences*.

Sub-theme 1 Taking stock of early experience of learning and education

Recollecting early educational stories had been painful for some participants. That legacy was difficult to erase and resulted in both consensual and argumentative patterns of communication within the group about schooling. Distinction between learning and education was made at this stage. Participants focussed upon *educational experience* to describe their early life experience while they focussed upon *learning* to describe their experience since retirement. The following extract reveals an exchange where difference between group participants is unfolding and the conflict between participants is used to clarify contextual issues.

Participant 2 L’s 128-134 “I was very angry with the whole system of education since I started school. I mean, I just felt totally failed, and I don’t know whether it was me – I think I was the failure, rather than the system. It [dyslexia] was like a conflict between the educational system and my lack of ability and I found that very hard. Then I had this start with the next generation coming up with

exactly the same problems and fighting along still and that's three generations – because that's the grandchildren as well”

Participant 8 L's 135-140 “Looking back on it, there was no great personal encouragement, I mean I was probably not due any encouragement because I was so mediocre, but eh,.....I don't think anybody in the classes that I was in at secondary school got the kind of encouragement that you read about in books and what now, Mr Chips and all that jazz.”

In both cases, individuals took ownership of their own “failure” but revealed disappointment with the educational system and in the first quote the issue has been played out over the subsequent three generations. No warmth from a significant other seemed to have acted as an encouraging voice for Participant 8. This prompted me to revisit the transcript of his learning and educational story, which revealed that he had lost both parents very early in his life and his wistfulness seems, bound up with more than the educational experience. He continues:

Participant 8 L151 “I don't think you were treated as if you were another human being sort of style”

While the others listened emphatically to this exchange with nods, Participant 3 responded:

Participant 3 L's 152-7 “Well, I'm sorry but I'm in a totally different world from you people, because when I left school I went with my shorts on for an interview. I knew exactly where I was going at that point from leaving school at fourteen, everything was open to you, the whole world was open to you”. He made no acknowledgement of the feelings expressed by either of the previous participants and the group did not challenge him. It was difficult to judge whether the group could not collectively deal with the lack of response to difficult early schooling experience or were unsure how to tackle Participant 3 for not acknowledging this painful process. This group response may have been about avoiding argument, which is an equally important group dynamic.

From this point, Participant 3 described a safe and predictable progression through a career path, which started with an apprenticeship and developed through technical college into full time work. He spoke with fondness of his early life and firmly believed that it was a superior learning experience

than perhaps is experienced by youngsters today. It prompted an interesting discussion, which *took stock of gender issues* in the group.

Sub-theme 2 Taking stock of the differences between men and women's early experiences

Participant 9 L's 183-4 "That's quite true because my brothers left school at fourteen and they all went into trades"

Participant 3 L.185 "The world was open to you"

Participant 1 L's 186-187 "I hate to say this.....because I know it will upset you.....is there a gender difference?"

Participant 3 L.188 "No because we took on girls as well as boys as apprentices"

Participant 1 L's 189-190 "I seem to remember from the background that I came from, my main interest was – I wanted to get married"

Participant 8 L.191 "as I remember it, there were limited careers for girls"

The group teased out the traditional expectations and lack of opportunities for women that existed in the early 1930s and 1940s. Women were expected to care for siblings and to look after the house. This had been the experience of three of the women in the group. However, at this point, the group did not want to pursue this dynamic and discussion returned to current educational standards in comparison to the 1930s by Participants 3,8 and 1. Shifting patterns of educational opportunity were mirrored in the groups' experience and night school had been a group norm for this collection of people. Within the discussion, there was an underlying theme of reminiscing about past vocational identity particularly for Participant 3 who with pride explained that he had been an "apprentices mentor". He brought photographs of a graduation ceremony to confirm this. Interestingly, mothers rather than fathers were evident in the photographs and no woman apprentices were graduating! This era was portrayed as a time of true teamwork, companionship and affiliation to a job, which gave him fulfilment. This response was interesting when linked to the next major theme within this focus group, which revolved around *taking stock of retirement*.

Sub-theme 3 Taking stock of retirement

SB L.251 “Am I right in saying that retirement posed a major transition?”

Participant 3 L’s 252-3 “Yes.....get the heck out of what I was doing andcan I do something different for a while!”

SBL.254 “So – a positive one?”

Participant 3 L.255 “Absolutely, I got a job as a private hire car driver”

This sequence seemed to contradict the previous impression about work being fulfilling and may represent the fact that changes were afoot in the engineering firm and Participant 3 retired on the cusp of this change but retained particular memories. It was the men in the group who expressed happiness about retirement:

Participant 8 L.256 “Mine was positive too, but in view of the fact that I was always pretty mediocre about work”

Participant 1 L’s 261-3 “I was very fortunate that I loved work, I was very privileged because I’ve known lots of people who have said “I couldn’t wait to get out of this”

Participant 9 L’s 264-5 “A smooth transition but I think that was because I was job sharing for a few years”

She went on to say L.269 “I think that I have learned more since I retired” and she continued with L’s 273-4 “when you are young you are forced to do it [learn] you’ve no choice, when you’re retired, you do what you like to do”

This exchange in the focus group about retirement did not tally with the individual interviews, where more participants talked about this being a troubling transition. Within the interviews, ambivalence was related to loss of role, changes in status and the notion of invisibility. The group situation seemed to evoke discussion of more positive changes related to choice. The example from Participant 8 is particularly interesting in terms of the change of attitude towards fitness and physical activity. When young, he L.282-283 “messed about in the gym”; now he attended the gym regularly,

had run marathons and “was fitter now than he was as a young man”. Paradoxically, the identity issues were of being healthier in later life.

Sub-theme 4 Taking stock of the quality of learning in later life

The next sub-theme that this focus group dealt with was *taking stock of the quality of learning in later life* and that in the view of the group, it differed from earlier in life. (Participant 4; L.’s 243-4) believed that it [learning] in later life: “teaches one to analyse, to doubt and be critical and to think twice about making a statement”. This sentiment was endorsed by (Participant 8; L.’s 258-261) who felt that “this is an aspect of education which I think is important and it wasn’t important in formal education but it is in retirement, and that is you can listen to someone else, you know you can disagree with them, you can agree with them but you are learning from social interaction”. The discussion in the group about this type of learning led to this view: “education is an attempt to *lead out* and the thing about this is that in the formal education that I had, it was a *putting in*, it wasn’t a leading out” (Participant 8; L.’s 282-3). This contrast between education and learning and the changes from their youth to the experiences in later life seemed to revolve around a greater reflectivity. Interestingly, learning in later life was perceived as both qualitatively different and better. The listening and learning experience of the group seemed to be important and it was considered that the focus group was involved with this experience “for instance that is what you are doing – you’re leading us out and not planting stuff into us” said (Participant 8; L.’s 285-6). The situated learning experience in the focus group was valued and again referred to in the final Postscript. (Participant 1; L.’s 319-20) took this further in relation to situated learning to state that: “every time you get on the bus you learn something, if it’s about change, or you sit behind people who are chatting”. Fear of formal education still haunted Participant 2, who loved learning but still retained a fear of failure.

The focus group drew to an end by *taking stock of the current reasons for learning* which revolved around fun, personal development, practicalities, being receptive to other people’s opinions and continuing to lobby for older people’s rights to education. All participants had hopes for the future

which included “sharpening up”, advocating for other older people and to use their talents to persuade other older people to get involved in educational pursuits to improve their quality of life.

Phase 3 Third focus group - group theme “moving on”

The over-arching theme for this final focus group emerged from the words and actions of the participants and a detectable shift in group agency. This seemed to be a continuation theme from the previous group entitled “taking stock”, and was perhaps a reaction to the perceived sense of exclusion that this group felt in the first focus group from policy initiatives concerning lifelong learning. It was also the reality that as a group they were *moving on* in this project and there was only the debriefing group left as a collective experience. As the group unfolded, four related sub-themes were evident from the analytical categories identified by the independent note taker and myself.

Participant 1, with the agreement of the others, had volunteered to compile a group story from the individual titles that participants had chosen to describe their own learning and educational stories. Thus, the beginning of the group was in the hands of the participants and as such was symbolically important. Themes of “going forward”, “work in progress” and “carrying on learning” characterised the opening phase of this group, as revealed by the following extract. Although the exchange occurred between Participant 1 and myself, the others listened intently and nodded in agreement:

F.G.3 Participant 1 L’s 9 - 11 “so, what I’ve come up with is ‘lifelong learning – a work in progress’ because I wanted to suggest we’re involved in something that’s going on and on”

SB L’s 15 – 16 “so, lifelong learning - a work in progress.....the second one [title] was.....let me get this right “live to learn – learn to live?”

Participant 1 L’s 17 - 19 “Again, trying to suggest something that’s going forward, because I’ve become really quite disillusioned just recently about how people define lifelong learning”

Participant 1 L.33 “.....because our stories after all are about carrying on learning”

The “*moving forward*” theme for older learners was perhaps part of Participant 1’s wish to provide a collective story of proactivity undeterred by obstacles such as lack of funding in Scotland for the Ransacker’s project. It is an exchange about the process of learning and an interpretation of lifelong learning which is more apt for older learners than the one perceived in *Life Through Learning Through Life* (2003.) That policy seemed to perpetuate the prevailing discourse about older people that they were not legitimate players in a lifelong learning agenda. However, the perception of exclusion in the group seemed to produce a reaction of *moving on* to find alternatives and overcome obstacles.

Sub-theme 1 Obstacles and alternatives to moving on

The next extract of continuous and complementary communication reveals delay and disappointment, which bedevilled active lobbying on behalf of interested parties and confirmed in the group a sense of older people being invisible in this lifelong learning agenda.

Participant 9 L’s 43-6 “We went to see Andy Kerr, the Minister of Finance.....he took the details and wrote a letter to Jim Wallace.....he got it slightly wrong because he said it was for both of us, but it was only for me, but he sent a copy of the letter to me and that was on the 5th October and I haven’t had a reply yet”

Participant 8 L’s 48 – 50 “and Jim Wallace is the minister responsible for lifelong learning. So it’s a sad story.....it’s a pity because the Ruskin one was a big success apparently”

Participant 2 L’s 55-8 “Can you remember the lady’s name.....the Edinburgh woman, she applied to go to Ruskin in the first instance.....well, this term she applied to go to Ruskin and they are not taking anyone from Scotland”

The group grappled with two reactions to this issue. One was disappointment and a feeling of exclusion on the basis of lack of finance and a view from three of the participants that they had been “privileged” to get funding for their own previous studies. The other was to create their own sense of agency and look for alternatives – in effect to *move on*. A stream of continuous and complementary communication followed concerning the participant’s own experience with U3A and how this

operated. It was characterised by a view that this kind of education depended upon mutuality: “everyone is expected to put in as well as take out” (Participant 5;L.111) it had been successful “I’ve learnt quite a lot more in life that I have before” (Participant 5; L’s 133-4). This form of informal education was being considered as an alternative to the activist role in the “older people’s movement” which had been the norm for Participants 8 and 9 for the last five years. Participants in the group all contributed to this discussion about alternatives, and an ethos of optimism was apparent in the group. Activist approaches had reached an impasse and now social approaches to learning were being sought by the group.

Sub-theme 2 The learning society as a possible context for moving on

This theme emerged from discussions about overcoming obstacles and seeking alternatives if lifelong learning policy was exclusive. In this dialogue, the group were exploring how they could make their own opportunities if they were not formally legislated for, and even the extent to which they created their own learning society in each other’s homes, libraries and by self study. The group considered that the trappings of a learning society were often restricted to technological solutions and that it was an “information society” which was one answer but not the only answer to the issues of social inclusion. It also led to the notion of self-imposed exclusion, and discussion of how to motivate wider participation of older people and whether women predominated in this respect.

Participant 4 L.188 “...to what extent.....is the U3A male or female orientated or is it a mixture?”

Participant 5 L’s 190-2 “You always find there’s a majority of women, but there’s a lot of men involved, the proportion of men to women is much more equal in the things I’m involved in”

The ensuing discussion involved all participants and revolved around the proportion of men to women in various groups which had not substantially altered over the last fifty years in Participant 2’s view, but this did not deter Participant 4 who went on to say:

Participant 4 L’s 235-7 “but the thing is – the 1930 clubs for learning – there was no women in them and I’m striving to see if it’s this concept that men don’t want to be intellectually associated with groups?”

This participant seemed to be testing out the notion of membership of a learning society and how it was conceptualised, but also how women had come to dominate informal arenas for learning in U3A. The group seemed loathe to deal with this. For this group, the idea of the learning society rested upon how it was defined.

Participant 1 L's 256 – 257 “I thought about it and I thought maybe it [the learning society] tries to educate the whole person, irrespective of age or sex.” This was enunciated in a wistful manner. The sub-text seemed to be concerned with speculation about exclusion on the grounds of both age and gender. While women had not featured in the 1930 clubs for learning, men were not featuring in contemporary learning groups such as U3A. This group also perceived other changes in the nature of society. Volunteers were difficult to get, older people were actively fulfilling surrogate parent roles as grandparents and it was becoming difficult to persuade other older people to take on committee membership roles. The group were presenting the counterpoint to notions of the learning society and posing serious questions about how to scaffold active citizenship. It perhaps naturally led again to the ideas of exclusion.

Sub-theme 3 Exclusion from society as a deterrent for moving on

This theme about exclusion from the learning society was re-introduced by recognition in the group that an active citizen was an “active economic unit” in the eyes of the Scottish Executive.

Participant 8 L's 421-24 “You see there's no kudos to be got from educating the old, reducing unemployment, having a smart workforce – these are definite advantages which they can claim that they are addressing, but there is nothing in it for them.” It is interesting that the “them and us” issue also resurfaced and exclusion was a reality in terms of finance. For example, the Worker's Educational Association fee was now £15 per term. If a couple wanted to pursue the same interest participation became financially prohibitive. Additionally, housebound older people were completely excluded from a learning society in Participant 8's view.

At this point in the focus group, the notion of participants being unrepresentative of older people arose. It created a wide-ranging discussion commencing from Participant 4's concern:

Participant 4 L's 464-466 "How do we answer them when they make this accusation that this is a select group.....if you didn't have a select group, would there be anybody?" In this statement, the comment is viewed as pejorative in the use of the word "accusation" but also the interesting issue is that this participant has perceived the idea of unrepresentativeness as "select". This follows the gist of the group in which they were proud to make their own solutions, find inexpensive ways of learning, and were not housebound. Participant 1 recognised this:

Participant 1 L's 470-477 ".....but don't those people who are not being represented need people like us, pushing to advocate until they in turn begin to.....yes, I think we've been lucky we're the fortunate ones". She continues:

Participant 1 L's 493-8 "Umm, we need the radicals" and gesticulates towards Participant 3. "It actually annoys me to be described as gloriously unrepresentative, because its so patronising.....perhaps we are.....but it's only people who are prepared to speak out who push against bureaucracy, well, I know more than one of us who has been totally exhausted pushing against bureaucracy – how else do you help others who are not in this room?"

Participant 8 L's 503-5 "Well, in a way, it all depends what you mean by representative.....what we are is representative of the active, engaged people from our own background"

While there is some confusion evident here concerning the scientific and democratic meaning of representation, the group found their own solution to the issue by noting that there were different realities and perceptions and adjusting their perspective accordingly.

Sub-theme 4 What is learning in later life for and what do you move on to?

This sub-theme re-orientated the group. If there was no political kudos from educating older people it seemed to the group that they had to find and locate their own meanings, purposes and *move on*.

Discussion switched from the ideas of a learning society to a healthy society where learning played a key role in wellbeing and personal development. Participant 8 made this conceptual switch:

Participant 8 L's 537-38 "I mean a healthy society would be one in which people are learning things and learning to participate in particular". Again, the response of the group was that this was the responsibility of each individual and learning was considered as a preventative measure against mental deterioration.

Participant 5 L.558 "that's why I play bridge". Nevertheless, learning for this group of people was for fun, for challenge and part of a quest for wellbeing as heard in the words of Participant 4:

Participant 4 L's 596-598 "We hope to obtain from our studies some form of excitement to keep us alive spiritually and so on and so that we can understand the environment in which we live".

Contemporary society seemed increasingly complicated and required a constant process of negotiation and adaptation. Tried and tested strategies were less useful. Tensions were also viewed by Participant 2 who noted that it was older people who had campaigned for free bus travel and now young mothers could take their children free but the penalty was extra community tax which had caused a local outcry. This switched the discussion back to being advocates and the perception of the group that politicians could not be trusted. All participants gave examples of disappointment with their local councillors or MSPs. However, in a similar vein to the final stages of the first focus group, Participant 9 wished to leave the group with a positive view that there would be a Commissioner for Older People in the near future. For the group, this offered a possibility of "*moving on*" their agenda, and details were shared about how participants could access web-sites and make their views known. The finale of the focus group echoed the opening in that there was no neat closure to learning and education in later life. They viewed themselves as "work in progress".

In summary, this section used group interaction as the main unit of analysis. This produced collective perceptions of exclusion and the policy was used symbolically as a microcosm for a sense of wider marginalisation from society. The transcripts reveal that exclusion was acutely felt as "rejection". As a defence at times, the group separated themselves from other older people who were characterised by "apathy" in contrast to their activism. Over the year, the group moved through the stages of development (Tuckman and Jensen 1977) both within groups and over time. Subsequent themes of "taking stock" and "moving on" indicate a strong sense of personal and collective agency.

My agenda and theirs diverged in the final focus group where I found it difficult to hold group attention to the topic. Their agenda was less concerned with the relationship between personal and political issues and more practically orientated.

Section 2 Narrative analysis of learning and educational stories within the nine in-depth interviews

“Evaluation is the soul of the narrative” Reissman (1993:20)

The topic-centred narratives about learning and education shared certain retrospective and introspective characteristics. A life course structure was taken during the interviews, which explored transitions and epiphanies about learning and education throughout formal schooling, situated learning or informal, work-based learning and finally learning which had occurred since retirement. Initial analysis elicited a descriptive profile of each participant outlined in Appendix 1 and then amalgamated into a composite profile of the group, which can be found in Appendix 2. Details of analytical processes can be found in Appendices 4 and 6. A helpful classificatory device for seeking to comprehend meanings within the transcripts was the hermeneutic triad (Hernadi 1987). This process commences from *explication* or trying to examine **what** the transcripts say, in this case about learning and education. It is followed by *explanation* about **why** the transcript might say that and finally *exploration* where there are attempts to offer an understanding or representation of what the transcript is **about**. While those processes will traverse this chapter and, in turn, the discussion and conclusion, Czarniawska (2004:60) considers that the benefit of using this classification is that it “resists the traditional divide between interpretation and explanation” by acknowledging that they can occur simultaneously and that this is helpful. Additionally, a synthesis of critical hermeneutics and narrative analysis allows insight into how the participants tell their stories against a socio-cultural and historical background of changes in society, education, different opportunities for men and women and perceptions about later life.

Themes which emerged from the analysis are recounted in a developmental sequence to provide a structure for this section of the chapter although narratives sequences occurring in the transcripts were more episodic. Despite an interview schedule, which began with early education and followed a predictable lifespan pattern, participants would constantly alter the traditional temporal order of events. Identification of analytical categories revealed turning points about learning related to schooling, adulthood, retirement and present day. In particular, themes were related to a sense of self and identity as a learner. Selection of narrative sequences about key learning issues in the lives of

participants were further analysed using Labov's (1967, 1977) socio-linguistic categories to elicit the meanings (evaluations) with which participants imbued their narratives concerning learning and education. To respect participants' own naming and framing of their learning story, I have adopted the titles that they attributed to their learning story as the identification mechanism for the narrative sequences. They are projections about learning and education and as such give a glimpse into associated personal meanings.

Titles of learning and education stories given by each participant to describe their experience

Table 4 Naming the stories

Participant 1	"Lifelong learning – the never ending story"
Participant 2	This was to be a two-volume story. The first to be called "Dire" and the second to be entitled "Emancipation"
Participant 3	"The rocky road of life"
Participant 4	"A life thinly spread"
Participant 5	"Education is life"
Participant 6	"Service to people"
Participant 7	"Participation in life as it comes"
Participant 8	"From mediocrity to skill"
Participant 9	"Seeing the light"

Themes related to learning and educational turning points seemed linked to learning identities, which were in a constant state of formation and transformation over the life course. This group collectively viewed learning as eternal; for example, Participant 1 forcefully states "certainly, in terms of learning and education, it will end when I die". Learning identities were formed because of, in spite of or as a consequence of issues noted in their total story. Distillation of analytical categories using the same iterative approach that I had employed with the analysis of focus groups transcripts, resulted in shared themes of:

1. Effects of early schooling and emergent learning identity
2. Turning points in learning identity during adulthood
3. Retirement and changes in the learning self
4. Lack of closure and a view of themselves as “work in progress”

Attempts are made within this analysis to ensure polyphony and to resist the possibility that my voice predominates. Therefore selected narrative sequences from each participant’s story illustrate both the contribution to emergent themes and participants’ evaluations. In this part of the thesis, two parts of the hermeneutic triad, namely explication and explanation, are covered with the final part of exploration largely reserved for Chapter 5 and discussion and conclusion of the thesis.

Selected narrative sequences using a Labovian analysis to illustrate personal evaluations (meanings) in each of the four themes

Theme 1: Effects of early schooling and emergent learning identity.

This first theme emerged from the process of examining the transcripts for insights about learning and education in the 1930s and 1940s, and why participants couched their descriptions in certain ways. The effects of war, evacuation, poverty and the expectations of women impacted upon learning and educational opportunity for this group. Formal schooling was restricted to nine years for seven out of the nine participants, and two of the women had remained at school until they were fifteen. Three participants described having to leave school to earn a living and help support their families. Only three of the participants remembered school and formal education as a positive experience. Amongst the references to early learning identities noted in the transcripts were as “a truant” and “bombing out of the 11+”, “education was my Achilles heel”, “I was mediocre” “I was Dux of the school” “it just came easy”. Those statements were delivered with emotional overtones and emphatic speech.

Narrative 1

Participant 2 Learning story entitled: First volume “Dire” second volume “Emancipation”

Abstract L.14 “I hated school so much”

Evaluation L.16 “Yes, I blocked that out”

Orientation L.27 “Well, I left in 1953 at the age of fifteen”

Complicating action L.29 “No, I left school and Imuch to my mother’s horrorwas helped out by the headmistress who said I was more or less just a trifler... ehm... and I was told that if I left school I had to get into employment, which was fair enough

Resolution L.32 “I joined the University Settlement.....and I was there for approximately a year.....then, I wanted to get into something that was slightly, ehm, I liked nursing, and I approached a friend of my parents...”

Evaluation L.94 “I don’t agree with the school system as it is, it’s totally inflexible

L.98 “if somebody had been interested enough, then they would have seen quite definitely that there was something inhibiting me from learning

Participant 2 is revealing painful memories of early schooling and the retrospective possibility (since diagnosed) in her own children and her grandchildren that she has dyslexia. Leaving school had been an affect-laden event with both mother and headmistress taking a negative stance about her as a learner. She did not waste time in finding employment nor did she relinquish the wish to continue learning. Despite a successful nursing career, this experience remained active in her consciousness and it influences her self-appraisal and identity as a learner even now. During her working life, the pattern was resurrected when she failed to get a job “for not having academic ability”, and despite “loving to learn” she has remained tentative in retirement about attempting an Open University module for “fear of failure”. While she overcame those difficulties, she regards her early schooling and her early struggles to pass examinations as “dire”. She is providing here a story about pessimism attributed to her potential to learn from significant people, and disappointment with the school system and her mother for failing to recognise her learning difficulties. This narrative sequence was part of a pattern in her overall story until her forties, whereupon there is triumph over adversity and subsequent emancipation in her view of herself as a competent learner in a different arena. It features as the

pivotal learning turning point and becomes the meta-story (Reissman 1993). Emancipation for this participant meant a change of professional world-view and the switch from working in a medical model to a social model of care. This was as important for her personal identity as her professional identity. For example, L.281 “Social work values were the values that really made me sit up and look at individuals with choice, deserving privacy and things like that”. She also seems to be talking about herself here. This poignant turning point is revealed in the title she attributes to her own learning and educational story, in which she considered that there should be in two volumes, the first called “Dire” and the second called “Emancipation”.

The next participant tells a contrasting story. Although she achieved a secure and successful early learning identity, the outcome after school was not entirely of her own choice and her working identity was shaped by other forces. This is revealed when using a micro analysis of narrative structure which reveals social and contextual issues.

Narrative 2

Participant 6 Learning story entitled “Service to people”

Abstract L.49 “How I got the post office job”

Orientation L.50 “Dr.....our headmaster had asked Dad. I became Dux of the school and he had come to see my Mum and Dad to see if – Dad thought he would like me to become a teacher, right, and Dad said if he thought that it was that way inclined for me....?”

Complicating action L.53 “but Mr [postmaster].....had come to Dr [headmaster] to ask if there was two girls in the top class who he thought would be suitable for the Post Office counter

L.56 “and Dad said to Dr.....[headmaster] well, if she does not like the Post Office – can she come back to you and he said – yes”

Evaluation L.57 “and fortunately, I loved the job, yes, yes”,

L.58 SB Did you have any lingering wishes to be a teacher?

Resolution L.59 “I did so a way but by then, as I say, when I started and got into the Post Office and especially when I became eighteen and Mr [postmaster] used to trot off for holidays and leave me in charge and I liked that”

Coda L.61 “I don’t know if I was being a wee bit bossy, but I really enjoyed that, but eh, no, I liked the post office”

In contrast to the first narrative, in this section of Participant 6’s story, it is clear that she had a most successful early educational experience. She was in the top class and was Dux. Frequently this participant exclaimed in focus groups or at other points in the interview that “she loved school”. Although she begins this narrative with a declaration about her own agency and choice in the statement “How I got the post office job” close attention to the text reveals that her father, the headmaster and the postmaster (all men) mediated the choice. It is also instructive to note that the postmaster asked about “two girls in the top class” not two pupils that may have included boys. The situation was both positively evaluated and resolved for her because she enjoyed the job and was trusted to look after the Post Office when only eighteen. Her own agency is resurrected in repetition of her liking for this work. In terms of identity, this job had status within the community and she became a well-known figure in her community. She has to this day a secure learning identity for practical matters, underpinned by values of “service to people” rather than abstract or theoretical issues, which she regards as “above her head!” The title of her learning story referred to her covert advocacy role for people in her locality as part of her job as postmistress, which she kept until she was sixty-eight and had to retire on grounds of ill-health.

Another issue concerning the formation of a learning identity, which was shared by Participant 5, 7 and 9, was the fact that girls were expected to relinquish their educational aspirations to help support the family in the home. This is conveyed in the third narrative within this first theme and it conveys Bruner’s (1996) view of the way that people learn through participation in culture and how their narratives subsequently reveal cultural and historical practices.

Narrative 3

Participant 9 Learning story entitled “Seeing the light”

Abstract L.15 “we didn’t have a secondary school so we had to go by train to.....”

Orientation L.17 “my mother died when I was fourteen. I had just started third year and I was the first one....I had two elder brothers”

Complicating action L.20 “I was the first one who actually made it to third year and then a month later my mother dies”

Evaluation L.21 “So, being the only girl I was just expected.....I had four brothers actually, so I just had to come out and into the house and that was that”

In this narrative sequence, Participant 9 is stating her own learning skill with some pride as the only one of her siblings to reach third year in school. Use of the word “just” which is repeated three times in quick succession emphasises the lack of personal autonomy in this situation. Educational aspirations were secondary for a girl to looking after the household, but she recounted this with no regret or sense of injustice. It was what had to be done. For this participant, return to formal education had to wait until 1970 when she attended evening classes and eventually the examination to become a clerical officer in the civil service. However, her epiphany came much later, when “seeing the light” was related to becoming confident about her learning after retirement and her view that she had “learned much more since retirement”.

In this next narrative sequence, Participant 8 to describe his learning identity uses the notion of “laziness and mediocrity” as evaluation statements which punctuated his whole transcript. However, there are also transactional issues between schooling and home life in terms of his early experience. Interestingly, there are similar contextual features in the story to the experience of Participant 9 (his wife).

Narrative 4

Participant 8 Learning story entitled “From mediocrity to skill”

Orientation L’s 631-2 I went from getting 80 odd in Latin in my second year to getting a real failure in 3rd year and that was because we changed from what you might term school boy Latin to real Latin in that year

Evaluation L.640 “maybe I was losing interest in school by that time because I was intending to leave

Complicating action L.642-3 “the other thing of course was that I didn’t have any parents, my mother died when I was four and my father when I was eleven

Here the participant is saying something about lack of significant people to encourage and support, but does not follow up with an evaluating statement. This is left unsaid but it reveals a conspicuous lack of people in his early life to affirm his ability. He conveys ambivalence about his learning identity. While he is able to deal with a classical subject until it becomes “real Latin”, he attributes this to a lack of motivation because he was going to leave school and there was nobody to encourage him. He clings to the mediocrity theme throughout his time in the army and most of his adult working life. It seems to be used both to define and to protect his sense of self. There is always an underlying impression of ability constrained by his own “laziness and mediocrity”, which he is aware of (and could do something about), but no-one else seems to see this potential.

Theme 2: Turning points in learning identity

All participants recounted tales of transition and epiphany within their learning stories. This was attributed to shifts in their own view of themselves as people who could learn and attain goals but frequently linked to a facilitating situation or person. The significance of those turning points is evident in at least three of the titles, for example “from mediocrity to skill”, “seeing the light” and the two volumes called “dire” and “emancipation”. In the following excerpts, participants explain and evaluate the significance of their learning and educational turning points. The impact upon identity is striking.

Narrative 1

Participant 1 Learning story entitled “Lifelong learning - the never ending story”

Abstract L.323 “well my OU course of course, my Arts Foundation and then the Diploma fromwas indeed my first – I suppose significant because it was a completed course with a certificate and it was the first time I had done a dissertation”

Evaluation L. 331 “I enjoyed everything about (Adult Education College)

Orientation L. 332 “I suppose I had always worked – now I had children, my husband had a business of his own, so I always had to earn a living to keep the children going

Complicating action L.337 “Life had been horrendous in England from my husband’s self employed point of view, and I thought right – he can do it now, so I suppose a bit of me thinking – I am going to do my thing and I’m going to enjoy getting an education

Evaluation L.344 “this was my time - the marriage was on the rocks anyway, but of course I suppose with me becoming more aware, you see it’s a bit like “Educating Rita”

In her story, this participant describes herself as a self-motivated lifelong learner who characteristically uses books, informal learning and formal education to negotiate difficult situations in her life. For example, “Oh, I think from an early age you disappeared into a book. I mean if your parents were having a row, you would go and read a book and keep out of the way”. The transition to formal learning - “Marx blew me away” marked a significant turning point for her both in her personal circumstances and her own learning identity. She describes books as transitional objects - “even now, I always carry a book” and “I didn’t have any friends.....and so, reading – you know, I didn’t need friends”, and education as the containing element in her own development. The most telling statement made by this participant about her relationship to learning was revealed in written notes to accompany her interview: “some girls remember their first kiss, I remember passing my first exam”. In the narrative excerpt, she claims a right to education after contribution to the family, the business and her marriage and this is used to manage the transition towards a change in marital status. She likens herself to the popular character of “Rita” and a change of perspective on life as a result of learning and education. Hers is indeed a never ending learning and educational story. That turning point was related to a chance for “her time” and from “flirting with education” to a sustained attempt to get an education and her MA degree in her early forties.

Positive transitions in learning were frequently linked to an increase in confidence or self-belief, as the following narrative extract reveals about a turning point in identity:

Narrative 2**Participant 8 Learning story entitled “From mediocrity to skill”**

Abstract L’s 678-9 “Well it comes down to my own gratification to some extent, it really does, it comes down to the fact that you want to excel”

Orientation L.684 “that’s right, when I found out that I had ability”

Complicating action L.686 “well, it was around the time of these computer programming courses, I got into data processing because the girl left the office”

Evaluation L’s 689-10 “it just so happened that I had a talent for programming things and so forth. I wrote some pretty serious programmes in my day and finding out that you are good at something is.....”

Resolution L.693 “it makes it worthwhile for doing other things”

SB L. 694 “it gives you confidence?”

L’s 695-6 “that’s right, at school, I never realised that I was a natural at mathematics, never realised that then in the main - because they just told you how to do things”

This transition from mediocrity to skill was serendipitous, because it was chance that the other person left the office. His natural talent had not been recognised elsewhere and he refers to an educational system that was didactic rather than empowering. This story is pervaded by self-reported themes of “laziness”. His ability is always implicit but not facilitated by home, school or significant others at work. The turning points define recognition about his ability both by himself and others. Finding out that he was good at something was the epiphany.

One of the most extreme turning points in the nine learning stories was from Participant 2 in her paradigm shift from medical orientation in her work to a social orientation:

Narrative 3**Participant 2 Learning stories entitled as first volume “Dire” second volume “Emancipation”**

Abstract L. 343 “Oh, social work was a absolutelyI mean, social work was a joy!”

Orientation L's 345-6 "I left the (hospital) and went across the road to this huge Victorian building which had been the "Poor House"

L.349 It certainly was my emancipation

Complicating action L's 349-50 "there was this twenty-nine year old Irish man who said "if you are managers – manage"

L.354 "I thought who the heck is he"

L's 359-60 "but it really – made us – look at what we were doing, why we were there and what was happening to these people coming in"

Evaluation L.361 "It was horrendous"

L.365 "it was a fight to get a tumbler for every one of them, it was dehumanisation"

Resolution L.371 "I said everyone will get their razors, their own shaving brushes, they will have their own soap"

L.374 "they said – "Oh, we have never done it"

Coda L.375 "I said, well this is the start!"

This participant is describing being engaged in her own professional transition and at the same time effecting a cultural transition within an institution. Contrary to the "trifler" image of early learning identity, she was fearlessly forging a change in long-standing institutional norms and indeed was strong enough to take industrial action about the poor conditions. "for me, to strike from a nursing background was horrendous...but I did not have any conflict because it was horrendous". Her belief system scaffolded her confidence level and she considered that she was part of a social change assisting in the lobbying for better conditions.

Those turning points are given extra salience when examined in key narrative sequences. The evaluations which participants made of their respective situations were always recounted with accompanying emotional responses. The resolve, anger or change in self-perception was palpable and overt. Participants were still affected by those chosen narratives of turning points in their learning and educational histories. Sustaining this change was also evident in transcripts whereby participants thereafter asserted their own autonomy.

Theme 3: Retirement and a change in the learning self

Retirement was a major turning point for all participants. The women participants were less willing to retire than the men and comments such as “Oh leaving.....I sat and wept” (Participant 2), and Participant 1: “I think it was traumatic retiring, not that I flung a wobbly all over the place – but I think you have to look back and say, well it was traumatic, where do I go, what do I do, my job was my life” convey the sense of loss of role and associated meaning. By contrast, Participant 3 exclaimed, “well at that age, I thought to hell with the rat race, so I went into something else”. The circumstance surrounding participants’ retirement seemed to be the crucial issue. For example, Participant 4 had to retire on grounds of ill health, as did Participant 6, while Participant 7 took advantage of an early retirement scheme and Participant 5 elected to retire early. The precursors to retirement determined the way that it was viewed. With the exception of Participant 3 and Participant 5, the others had retired within the last five years.

Atchley (2000:4) in reviewing critical perspectives on retirement considered that from “an individualistic perspective, retirement has also come to be seen as a stimulus for human development”. For this group of older people, continued learning was an active choice in this respect. Learning in the service of others through voluntary work, which extended existing skills, was apparent in Participant 3’s story whereby he used his practical skills in design and engineering to adapt equipment and environments. For others, learning was linked to advocacy and lobbying for the rights of older people through local and national forums. This could become as arduous as formalised work, with Participants 8 and 9 attending twenty-six different committees about issues concerning older people. Participants were extremely knowledgeable about community learning plans that had been initiated as part of the Scottish Executive ‘Community Learning Strategies’. Each Scottish council had to produce a plan in partnership with local organisations to improve community learning provision. They also know about the way that *Better Government for Older People* worked and about learning and educational opportunities within their respective communities.

The relationship between learning and teaching was strong for all participants, with Participants 1,3,4,5,6,7,and 9 actively involved in some kind of teaching activity. This included being a senior health mentor, being an adult basic education tutor, acting as a guide in a historical building and guest lecturing for undergraduates. Three participants had also been invited to secondary schools to teach in various capacities. Their respective experience was valued and this contributed to an altruistic identity and a view of themselves as useful. Intrinsic meaning was derived from those activities which were crucial and led Participant 4 to say that in the event of not being required to teach undergraduates once per year, “he would be let down gently”.

Learning in formal, informal and non-formal situations were talked about with enthusiasm.

Participant 3 considered that “learning meant everything to him” and when asked to elucidate he described a continued drive to read technical manuals and stay alongside current affairs. Participant 1 considered that “every time she read a bus timetable” she was learning and Participants 8 and 9 made the decision over the course of the year to withdraw from committee representation and enjoy “learning for fun”. As the focus groups revealed, a rich array of learning activities were undertaken by this group ranging from U3A, library based book groups, activities run by community education and more recently Education for Participation run by the Centre for the Older Person’s Agenda. Two participants had extended their role in that Centre in the direction of research associates and co-facilitators of subsequent course in Education for Participation.

The renaissance in learning which was a theme emerging from the narrative interviews seemed to be motivated by a wish to stay mentally active and healthy as Participant 9 reveals.

Narrative 1

Participant 9 Learning story entitled “Seeing the light”

Abstract L.153 SB “So you are interested in older people’s issues, what would you say was the one that really caught your imagination the most

Orientation L.155 “The one I’m most interested in? Health – and not so much health as prevention”

Evaluation L.172 “Well, I think as we said before, if your brain is active you then you will probably be able to function better for a longer time, than just stagnating”

L.177 “I have visited residential homes and nursing homes and you see cases there.....(sighs and pauses)

Resolution L.180 “although I suppose when you get to that stage you don’t know any better anyway, so you don’t know what you are missing

This extract when analysed for meaning reveals the motivation for continuing to learn and the fear of mental deterioration. Strong interest is suggested in the notion of “prevention” rather than health per se. This participant has considered that “she has learned more since she retired”. She is an activist who will actively demonstrate for the causes she believes in and will always seek out a means of lobbying the appropriate political official. “Seeing the light” for her was about overcoming lack of opportunity in early childhood and the fact that she did not progress in her job: “I wasn’t pushy enough, I did not have the confidence that got you promoted”. In retirement, she was interested in “becoming critical” and her view was that “you read different books if you’ve been educated”.

Narrative 2

Participant 1 Learning story entitled “Lifelong learning –the never ending story”

For this participant, learning has always been an intrinsic part of her life and upon retirement and she seeks out low cost, high quality activities, which stimulate her need to learn. The following excerpt reveals involvement that contributes to the quality of her life.

Abstract L.483 “I just couldn’t imagine not wanting to learn, not wanting to find out”

Orientation L’s 484-5 I’m a member of U3A and I go to the music group and the film appreciation group, so I’m going to see all sorts of films that I might not have thought of”

L’s 494-5 ”I’m doing at the moment, the SQA for dyslexia awareness in adults, which alright is allied a bit to what I’m doing

Complicating action L’s 497-8 “something like this which is sort of academic if you like, I love it I can feel myself relaxing when I go into a place of learning”

Evaluation L.499 “I can’t imagine ever not wanting to ”

L. 502 “it’s always been there”

L’s 507-8 “yes, the Foundation course was wonderful, I would do it all again, I do, I get a buzz from learning”

Resolution L’s 532-33 “I think this is what’s come through to me because you don’t think about it but I never even thought of myself as a particularly determined person, but I do realise that it was a driving force”

This participant seems to have accurately titled her learning story. It [learning] is given an identity by this participant and it is a “given” in her life. Retirement presents her with challenges to manage a reduced income but allows her opportunities to expand her own interests. Her paid work as an adult basic education tutor is now getting in the way of her wish to read and pursue her own agenda. However, in a similar vein to Participant 9, she fears the onset of incapacity in later life and of stereotyping on the grounds of age “If you actually say outright, I’m retired you can see the eyes of people that have been talking to you glaze over”. From a hermeneutical perspective Peacock and Holland (1993:372) consider this dilemma as a “confrontation with the alien other” and this person’s own internal struggle with ageing.

While the “use it or lose it” maxim may be instrumental in the motivation to continue learning in later life, there was a wish from all participants for good quality learning opportunities to stretch imagination and stimulate curiosity. Although there is evidence from Leamy and Clough (2001) that the older people they worked with wanted to pursue certificated courses, this group did not. Learning for fun, pure enjoyment, companionship and interest were the main goals. In terms of identity, this group wanted to be regarded as having a legitimate viewpoint. They did not match the dominant discourse about ageing as decline and had all sought to represent older people who were less confident than they were. While the role of advocate was valuable, this group felt that, realistically, it could not be sustained for long periods of time. Their constant challenge was to persuade other older people to fill their membership roles.

Theme 4: Lack of closure and the idea of themselves as “work in progress”

Although all participants indicated in their learning stories that they were making changes in the manner in which they were accessing learning opportunities, there was one enduring message that permeated all of the stories. Participant 5 had constantly reiterated the value of “life’s learning” and for her this learning about self characterised her story called “Education is life”. This person was aware that she had experienced many advantages in relation to the others. While she had to look after the household in addition to her work in the early part of her life, she experienced no poverty and in her words has experienced “many advantages”.

Narrative 1

Participant 5 Learning story entitled “Education is life”

Abstract L.825 “I’m at a crossroads and I don’t know what I’m doing next”

L. 836 “its about principle, perhaps I am too hide bound in my principles you see.”

Orientation L’s 839-40 “I don’t know what I’m going to do next. I’m not doing any voluntary work at the moment and I miss it, so I’m still looking for something that appeals”

Complicating action L.858 “I’m sorry that I’ve closed some of the openings”

Evaluation L.882 “I need to go out to get company”

L’s 894-5 “To split my life off from life’s learning and life is almost impossible”

This extract is one of a pattern of responses throughout the transcript where there has been frustration with schooling, situations at work, voluntary work and with learning opportunities in later life. She remarked that “frustration is my middle name”. However, her honest, candid and critical self-awareness conveyed a sense of learning from those experiences and appreciation of those exchanges as education. The “I” is a strong feature in all lines of the narrative segment and the line chosen for the abstract and to set the scene is about the possibility that she is too “hide bound”. She needs company and the sense of involvement from doing voluntary work. Words such as “miss”, “sorry” and “need” convey poignancy about how she regards herself. There is the impression that she does reflect upon herself in relation to others and to situations with candour. Life is equated with learning and implicitly with others. The message here is that although she avails herself of many learning opportunities, the greatest learning is about self.

At 81, Participant 3 was the oldest member of the group. He had attended the Education for Participation course twice and was always the first one to arrive for the groups and came to the interview bearing photographs and cuttings about his working life. He had been retired for over twenty years and in that time had built boats, worked as a volunteer and continued to read technical engineering manuals. His identity seemed entirely linked with practical problem solving although his self-perception was about being “radical” and this infuses the title that he chose for his learning story. Other participants considered him radical in his views about present health and social care, education and business. He hankered after a time when in his view, a “good community spirit” could be experienced and things were better than they were now.

Narrative 2

Participant 3 Learning story entitled “Rocky road of life”

Abstract (SB) L. 336 “What has learning and education meant to you throughout life?”

Orientation L.337 “well, in one word – everything – I can really state its just everything”

Complicating action L.339 “Oh yes, because I have given you the formal side of it, the other side of the learning is when I was on holiday, when I was caravanning”

Evaluation L.368 “What more of an education could you have?”

L.370 “.....learning about nature, the lot”

The way that this gentleman described and reported his identity seemed bound to the past and what he described as an idyllic earlier life. His current source of learning was reading the newspaper, reading technical manuals and listening to the radio. He was interested in the arguments about wind power, and had written to the newspapers on a number of occasions about issues that had troubled him. It is difficult to comprehend the meaning of his chosen title except in terms of learning from life with all its successes and difficulties. His emphasis about what learning means to him by repeating the word “everything” is revealing and he perceives learning as all encompassing through his views of formal and informal learning. Evaluative comments here are about acknowledging the impact of informal learning.

In the acknowledgement of different types of learning, those two extracts endorse the idea that participants' view of learning was all pervasive and lifelong. Learning was a live construct and it significantly contributed to their sense of self and influenced the quality of life. Regardless of whether specific educational opportunities were accessible, participants convincingly recounted how intrinsic learning was to them and how they found their own outlets.

While the focus groups provided the opportunity to analyse collective views about learning and education in later life, close analysis of the structure of narrative sequences of an overall story has permitted an insight into the meanings attributed to key aspects of learning identity. As Reissman (1993:20) explains, in "evaluation clauses, which typically permeate the narrative, the teller stands back from the unfolding action and tells how he or she has chosen to interpret it". While this may fragment the overall story, within the selected narrative extract where participants are outlining an issue, language is used to persuade the interviewer and subsequent audience of the salience of a particular point. Close attention to the text, patterns of language and use of words reveals intrinsic meanings but also gives insight into social context. The key issue is to explore how evaluations are constructed. Polkinghorne (1988) maintains that the plot of a narrative melds disparate events into a meaningful whole. In relation to learning and education this has inevitably revealed the social context in which learning identities were formed.

Czarniawska (2004) outlines two perspectives of narrative in social science, namely narrative as a way of knowing and narrative as a mode of communication. The former is pertinent in this context. In epistemological terms, narrative as a way of knowing about learning and education in the lives of older people offers a sense of perspective, unfolding values about learning over time and the possibility of contested perceptions. Plots and evaluations can be constructed in different ways and the task of the researcher is to report the glimpse of meanings that interviewees reveal in their narrative. In this exploration, learning identities are embedded in informal, non-formal and formal situations throughout the lifespan, all of which are recognised and reported by participants. This

group of participants embodies the meaning of lifelong learning and gives evidence of this across their lives, with no sense of closure.

Section 3 Analysis of this interpretive research process: resonance and dissonance

“Each crisis and experience of dissonance usually represents an important critical moment in the research” Pinn (2001:189)

Hermeneutic analysis constantly oscillates between parts in relation to whole and vice versa in an attempt to elicit meaning and understanding. Dissonance frequently attends this process as a picture is built, dismantled, built and reshaped according to repeated analyses. The sustained activity over the year was an advantage in allowing time to reflect upon, discuss and revisit issues thus allowing themes to develop. This brought its own dynamic and a keen view of mortality, sometimes referred to as “ontological anxiety” concerning the participants’ relationship to time could be heard in their reaction to the proposed year-long involvement with this study. Participant 4 proclaimed that a twelve-month collaboration rested on the premise that “we are still alive!”

My intention in this section is to analyse:

- Group processes including issues concerning collaboration
- Individual processes in relation to telling the story, naming the story, member checking activity and what the narratives convey about learning in later life
- Synthesis of findings between the focus groups and narrative interviews showing reverberating meanings

I drew upon my thematic analyses of both focus groups and individual stories for this section but most particularly I used my reflective notes from all parts of the process. Details of how this analysis proceeded can be found in Appendix 4.

Group processes over the year

There were five group meetings over the year and in the early sessions mutual appraisal was apparent in the forming stage of the group (Tuckman and Jensen 1977). Two natural pairings already existed and included a husband and wife and two friends who traveled together. This group was a place to share norms about learning and education, for example, the age they had left formal education, their common history of war time, their work histories, when retirement had occurred and their common interests in volunteering and advocacy. Details can be found in Appendices 1 and 2. Successes in formal education were also shared. For example, Participant 8 explained that he had “come to

appreciate education late in life, graduating from the Open University at age fifty". Alongside this, sharing of norms was an underlying dynamic of positioning of roles within the group (Baron and Kerr 2003). For example, members quickly began to relate to Participant 3 as "reactionary", Participant 8 as "knowledgeable about the older people's movement" and Participant 2 as "politically astute".

At this early stage, I experienced my first crisis of how to reconcile notions of co-operation, collaboration, and dialogical practice within the research process. I had commenced with ideals of collaborative working but swiftly discovered that I had not designed this formally along the lines of participatory research or in the spirit of projects such as Chambers and Pickard (2001). Without discussion, I initiated the study, chose the methodology and the method and would report on the event. The work was, however, dialogical and as the process unfolded, self-initiated collaboration occurred, for example, in the decision by Participant 1 to devise a title for the group story and when Participant 8 agreed to write the Postscript. Collaborative work is logistically and conceptually complex, and Bryne-Armstrong (2001:107) in writing about her own crises in so-called collaborative projects, considers that co-research as a process often masks inevitable power differences and this may create a "tyranny of niceness".

In the first focus group, group affiliation was sustained by an unequivocal view that older people were invisible in the vision of *Life Through Learning Through Life* (2003). Baron and Kerr (2003) describe the possibility of group polarisation effects in situations such as this. Certainly, it could be detected from analysis of the transcript that vocal and articulate participants may have silenced the views of less confident members. No dissent against the vocal participants' view of exclusion of older people from lifelong learning policy was heard, for example on the grounds that they might be included implicitly within the political vision. From reading the transcripts, it is possible that Participants 6, 7 and 9 through their silence could have been influenced in this way.

Participant 4 expressed anxiety concerning wider social relations between older people and the rest of society. In particular, how this was manifest and operationalised through a policy perceived as exclusionary by the group. Towards the end of the first group he exclaimed, (F.G.1; L735-739) "I

find this group is reflecting a breed of cynicism almost to anarchy which is now sweeping the country, reflecting the number of you who don't want to vote, and I don't know how politically you can sort this mess out. I think we're in a bigger mess than we imagine". This response situated the group as a microcosm of wider social forces. Although two members of the group agreed with the sentiments expressed, the others found this idea uncomfortable to conclude the group with. This was evident from non-verbal behaviour and Participant 2 responded by taking responsibility for closing the group on a rallying call because (F.G.1; L754) "power was in the majority" and their task was to get older people interested. So, while perceived exclusion was painful for all, it seemed that they could not tolerate pessimism amongst themselves. In Tuckman and Jensen's (1977) developmental view of group structure, this group had formed but was now experimenting with difference of opinion and reorganisation of group roles.

From a critical hermeneutic perspective, interpretation of the impact that this policy document had on the group served to endorse and sustain a perceived negative and dominant discourse about older people in society. Also, perceived dismissal of any notion that learning and education might be valuable to people in later life was evident. The impact of that message on the group was intense but there was strong group pressure to remain united rather than fragmented or pessimistic. As an exploratory device, it bonded the group but may have individually created tension, as the individual comments in the Postscript convey.

In the second focus group there were only six participants consisting of three men and three women. Roles had altered again for this event, and Participant 4 opened the group and changed his role from pessimist to active protagonist. Participant 9 also interjected early and remained active throughout in contrast to the first group. The tenor of the group seemed qualitatively different from the task-orientated ethos of the first focus group, and I was conscious that I knew about individual histories but the group were only party to my analysis of content and the titles of respective learning stories. The table of learning story titles and the group profile acted as the focus for a substantial part of the group with interesting reactions. Intuitively, participants were aware of the partial and contingent nature of their responses as they had told their story. Participant 2 crystallised the issue

for the group in the following comment (F.G.2 L50-1): “I think a script would change perhaps not from day to day but certainlyfor what impinges on your life at the time.....because my story certainly did”. This theme resonated throughout the group and produced reactions such as Participant 1 L’s 88-9 “I found I had to distance myself, I had to make out I was reading someone else’s story”. This distancing dynamic removed self from difficult life events, objectified them and in doing so made them more manageable. Throughout the discussion, the group accepted that their narratives would always be incomplete, and inwardly variable.

Another social theme in this group was life chances and the link with gender. Three women participants had to forgo early educational ambition to look after siblings and to run households. No recriminations accompanied this information and it was delivered in a matter of fact tone even when Participant 3 fondly stated L’s 156-7 “the world was open to you [as a man]” and was followed by Participant 1 saying L’s.186-7 “I hate to say this.....because I know it will upset you, but is there a gender difference?” Two other women had to “wait their turn for education” until children had grown up and they then claimed their time in this respect.

An interesting action emerging from the second group was Participant 1’s wish to take the learning story titles and blend them into one title which would describe the group’s learning story. This seemed to be a measure of safety and cohesion within the group. In Tuckman and Jensen’s (1977) view this group seemed to be clearly in the performing stage whereby they were responding to one another, challenging one another and seeking independent actions from the facilitator. The reduced size may have contributed to this cohesiveness within the group. My role as facilitator was minimal at this stage as the transcript reveals. Hague (1993) considers that the group facilitator should occupy no more than 10% of the resulting transcript. At this point I invited them to consider writing a Postscript for my thesis and in effect was seeking additional co-operation not initially outlined at the briefing session. Participant 8 agreed to orchestrate this if everyone completed an individual account and gave it to him for compilation.

In the final focus group, one of the key dynamics was the reintegration of three participants into a setting where many decisions had previously been taken and this effectively silenced three members from the early discussion in this group. Participant 1 rather hesitantly offered two titles to describe the group story.. One was “Lifelong learning a work in progress”, and the other was “Live to learn – learn to live”, that she thought captured the optimism in the group “because our stories are all about carrying on learning, and I think we have all been involvedeven recently”. This response was characteristic of the group theme of “moving on”. At this point, she sought information from Participants 8 and 9 about developments with the Ransackers Project. Unfortunately, this eclipsed discussion of the proffered titles because the project had not materialised and the group returned to the theme of exclusion from learning and educational opportunities with comments such as (F.G.3 P2 L103-6) “I mean when it comes back to it – it’s the privileged who have money – an you know, it widens the gapif you have money, and you are educated previously, or have some form of education, the world can be your oyster”. Exclusion on the basis of insufficient funds to access educational opportunities reverberated from the first group experience.

At this point however, the group changed direction almost as if they had exhausted any possibility offered through lifelong learning channels and as if they did not want to re-engage with the negative exclusionary discourse. Participant 8 asked the group for information about U3A and it was at this point that the three members who had been absent from the previous group were able to enter the discussion. The group was then involved in sharing of information about learning opportunities that did exist and that they could access. Again, the gender issue appeared prompted by Participant 4 L.286 “I am striving to see if its this concept that men don’t want to be intellectually associated with groups”. This initiated a strong socio-cultural theme about changes to the gender balance in occupations such as nursing and to the rules for membership in some sports clubs. So, it was still on the theme of exclusion but a differentiated gender issue.

In the debriefing group, analysis of my reflective notes reveals another crisis. Transparency was my intention, to ensure that the group felt included in my evolving understanding of learning and education in later life. But, in this somewhat formal presentation, six participants listened carefully,

took notes and asked for clarification of the type of study. It was like a viva of my work in progress where I was asked how I analysed the groups, what the titles of their learning and education stories conveyed and what I hoped to achieve. The reciprocity between participants found in other group meetings had evaporated and group closure was a dynamic that was palpable. On reflection, this was not only a debriefing event but also an important monitoring event for the group. Changing roles had occurred over the year, with the two original activists seeking alternative learning opportunity out with the “older peoples movement” and another two participants taking up such opportunities. Participants 2 and 5 were at transitional points in their lives regarding where to put their energies or were compromised by family commitments. Groups deal with closure in different ways and it was interesting that both the group and I had resurrected a previous pattern of operating to finalise the face-to-face experience.

Brief analysis of the other collaborative event of this experience in the production of the Postscript revealed that this group perceived my study accurately as emerging from practice and the original Education for Participation course. Also, the research process seemed to be perceived as analogous to an educational process. Amongst the reactions to the experience was a clear message that they had enjoyed being involved and that amongst the benefits were “I enjoyed the discipline of working on this project.....of developing and broadening my thoughts”. Raising consciousness and formulating change is the intention of critical hermeneutics and to some extent this had occurred. However, it is wise to acknowledge Dahlgren’s (1988:292) point that “all talk through which people generate meaning is contextual and the context will inevitably somewhat colour the meaning”.

Individual processes

Reissman (1993) provides the most helpful means to analyse how individual participants experienced elements of the research process. It was an unusual experience for participants to recount learning and educational stories and extrapolate those issues from the rest of their life history. Thus, how people told their story and why they chose to recount it in a particular way was important. Three areas loosely based upon Reissman’s (1993:10) levels of representation in the research process are chosen for analysis. Firstly, the telling and the naming of their story in the interview situation is

appraised. Secondly the member checking process is evaluated. Finally analysis of what the biographical stories reveal about learning in later life occurs.

Telling stories involved identity-construction and was a pivotal part of the research process (Kehily 1995). Participants had prepared in different ways for recounting their narratives. Only two people had not made notes or had rehearsed in some way. The interview was an event, which participants had carefully considered in terms of location, props, timing and self-presentation. The chosen contexts varied from my office, their own homes, university campus and a community centre and all had relevance to participants' comfort and ease of telling their story. In this situation, Participants 6,7 and 9 who were less confident about expressing their views within the group found an arena in which to explore and discuss their personal stories about learning and education with more ease. Considerable emotion accompanied the narratives of Participants 1, 2 and 3 while others recounted difficult circumstances in a matter-of-fact tone. One example of the vividness inherent in the telling of those stories was from Participant 1, who was reluctant to talk about her early life but in an animated way elaborated upon when she "became hooked on learning for its own sake" in 1952. This epiphany was success with merit in an RSA English Language examination and she exclaimed "some girls remember their first kiss, I remember the first examination that I passed!"

The nature of my questions and the extent of my attentiveness and engagement with the process shaped the telling of each story. For example, Participant 2 clearly indicates a major turning point in her learning when she switched her job from nursing to social work. The story that we co-constructed was about her resilience, capability and thriving in this new context but my reflective notes comment upon a tentativeness about asking her to consider the present and what learning meant now. Her own discomfort about formal learning had always been overshadowed by dyslexia, which was now being replayed in the lives of her son and grandchildren. Our joint reluctance to pursue the present seemed related to an agenda out with the scope of the interview.

One of the most important parts of the narrative interviews was where participants had to think of their own learning story as a book and to give it a title. Naming and framing their stories was imbued

with meaning as the titles reveal in Section 2 of Chapter 4. Reflecting upon the chosen titles, it is interesting that Participants 1 and 5 name their story using key words from the title of my study and perhaps was an attempt at coherence. Participants 2, 8 and 9 indicated changes in their relationship with learning and education, which contributed to a narrative theme of turning points. The four references to “life” within the titles may be construed as a view that learning is intrinsic to life. The others make reference to learning and education, which are not immediately obvious to the reader but in light of their full stories meanings can be comprehended. For example, Participant 7 in the interview revealed a strong locus of control in her life but had not been ambitious and had indeed “participated in life as it came” rather than exercise her own aspirations to be a teacher.

The process of recalling learning and educational stories also raised issues about identity and how the participants viewed themselves as learners. For example, “learning came easy” for Participants 6 and 9, “I was a trifler” said Participant 2, and “I was mediocre at school” from Participant 8. Curiously, those for whom learning had come easy and who had been the Dux of their schools did not undertake any further formal education, whereas others such as Participants 1, 2, 3, 4 and 9 had gone on to acquire professional qualifications. Memories about learning and education were explained in relation to significant others such as teachers, librarians, siblings, partners, employers or friends. This was related to acts of encouragement and interest in them as individuals. That had a lasting impact, not least in allowing them to subsequently become helping and caring individuals whom in turn encouraged others as their full narratives attest to. Many instances of early wishes to be a teacher had resulted in teaching by proxy, for example, teaching practical classes in the local secondary school, becoming a Brownie leader, becoming a mentor for others with a similar health issue or becoming a guide in a stately home. Participants constantly strove to find ways of making sense and achieve coherence within their learning stories. Patterns of continuity were frequently spotted by participants and commented upon in an existential way whereby participants felt that events in their lives were “meant to be”. In the case of Participant 4, he had ended up conducting the funerals of significant people in his life who had mentored him. While saddened, he perceived this as a final contribution from him and closure was thereby effected.

Member checking of the narrative transcripts offered another opportunity for individual agency and it was a particularly important phenomenon in the study for participants. The extent of that activity can be seen in Appendix 3. I was preoccupied with why in some instances this should result in precise editing and in other cases a minimal response. My analysis eventually resulted in three possibilities involving presenting the self, and how this image was recorded, which in turn was related to present and future audiences (Andrews 2002). Intense interest was shown in this activity and how their story in the transcript was recorded. In my analysis it seemed that perceived omissions related to key identity issues. I treated this as a specific finding and part of an unfolding story of this group. The wish to "put the record straight," a phrase borrowed from Participants 2 and 4, was a preoccupation of all participants but particularly so for Participants 1, 2, 3, 4 and 5. Conversely, the interviews with Participant 6, which was revealing about situational learning and how crisis and difficult life transitions had been surpassed and survived, received only minor corrections. This record seemed to speak for itself. Correction to the actual transcripts was accompanied by telephone calls, or letters from three participants to rectify perceived misunderstanding on my behalf. Accuracy of those transcripts seemed to have intrinsic meaning for the participants. For example, Participants 1 and 8 wanted to ensure accuracy of qualifications which seemed to equate with their hard won status in that respect. Participant 3 wanted to ensure accurate mention of tasks or projects that had been completed, and curiously he was someone who thrived upon practical problem solving. Participant 2 wanted to record her debt to others for any advancement she had made in her life. This has to be understood in the context of her feeling that she had not entered nursing due to her own merit. So, those important corrections revealed more than a wish for procedural accuracy and reverberated with perceptions about identity, self worth and even guilt about omissions in their recall.

Another interesting feature occurred when I double checked the member-checked transcript with the tape and found that where corrections were made on the transcript, it referred to what the participant would have liked to say rather than the transcript "evidence". This was especially evident in the transcript from Participant 3. The manner in which they were corrected was also interesting particularly in the case of Participant 7 who dealt with the task in a detached manner and annotated the text in ways reminiscent of her previous work as a civil servant. Participant 5 made no effort to

erase material unsympathetic to her as a person. The transcript may have acted as the catalyst for her view that “I can’t help feeling that there is something in my personality that is stopping ...or is making me difficult with these people”. She was candid and self aware in the interview but seemed to find difficulty in actually changing her behaviour, which over her life had resulted in her exit from many situations. Those actions in annotating their learning stories conveyed as much about personalities and interactions with others as it did about learning and education. Reactions to the member checking exercise revealed projections on and to the script of issues that had enduring meaning for them as individuals. “Putting the record straight” seemed vital for them regardless of any other audience for the thesis. A form of emplotment (Polkinghorne 1991) was being enacted in this part of the research process whereby participants were involved in further sense making of their own story.

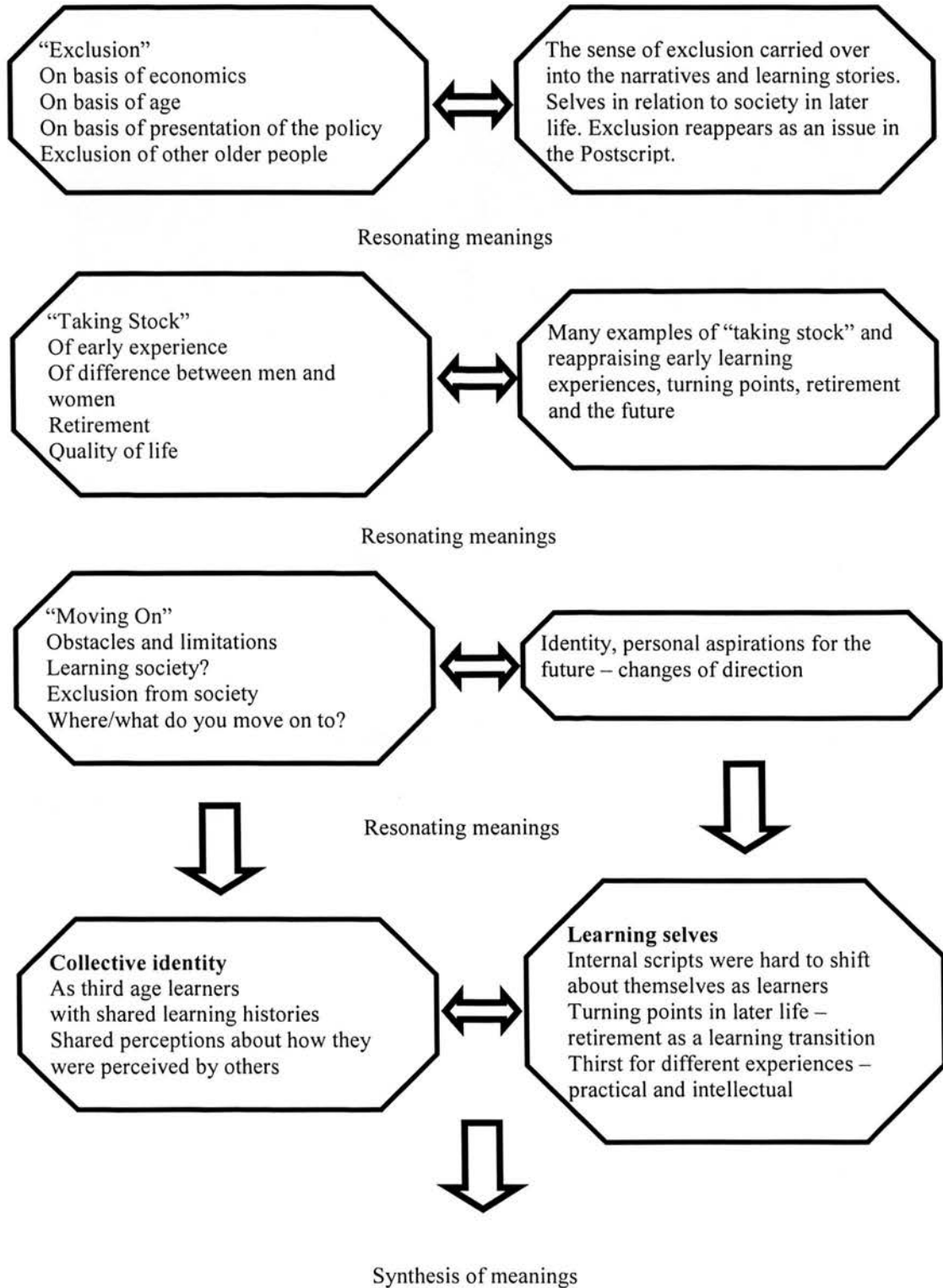
Synthesis of findings

As Linde (1993:3) explains life stories “express our sense of self: who we are and how we got that way”. The process of analysing the narrative interviews produced possible insights into why learning and education was important in the lives of the nine participants who could be described as archetypal lifelong learners. While themes and dynamics reverberated between methods throughout the experience, narrative interviews encouraged evaluation of the past whereas the focus group meetings were by nature more concerned with the “here and now”.

Figure 2 Syntheses of Findings

Focus groups

Narrative Interviews



Perceptions of themselves as a “Work in Progress”

As Figure 2 reveals there is resonance between the findings from the focus groups and the topic-centred narrative interviews culminating in the collective and personal idea of participants as “work in progress”. This was the title attributed to the group story by Participant 1. However, it could also refer to identity construction as a perpetual “work in progress” and a lifelong process. Analysis of this research process reveals the extent to which learning and educational activities shape a sense of self and contribute to identity. But analysis also reveals dissonance in all parts of the process, which tends to produce reactions that need a reflexive response. In particular these relate to dynamic tensions in the policy story, the group story, the personal stories and indeed my story of the research process. This relates to issues of inclusion and exclusion, contributions and omissions and collaboration or cooperation. For example:

- The values expressed in *Life Through Learning Through Life* (2003) intend to facilitate social inclusion but through omission of the social purposes of learning in the policy narrative it resulted in a sense of exclusion and rejection for participants.
- This group of older people consider themselves to be active citizens and lifelong learners but when rendered invisible in a public text, they in turn psychologically distance themselves in their narratives from other older people who are perceived as less active than they are.
- Participants created meaning in their learning and educational stories, organised the past and chose particular learning and educational events to recount. But, in each story it is what people did not volunteer that is of equal importance: for example, Participant 1 would not deal with early life events but gives a rich account of the time from 15 onwards.
- I aim to create a collaborative study but do not establish the necessary procedures and parameters and experience dissonance between my ideals and pragmatic reality.

Those points emphasise the need to keep analysis of such dynamic activity open and to treat the entire process as “work in progress”.

Section 4 Locating myself within this research process

“the self is always an abiding influence in and on our writing” Ezzy (2002:150)

Reflexivity has become axiomatic for qualitative research in the interpretative tradition. It is a process that situates the researcher within the generation of knowledge. As such, critical self-awareness is required to probe the intra-subjective and interactive processes, which shape the design and execution of social research (Finlay 2002, Finlay and Gough 2003). The process is a dynamic one and as Johns (2000:61) reveals, it is concerned with “looking back and seeing self as a changed person” and gaining insight into aspects, which influence perception, thought and action. This reciprocity has the potential to increase sensitivity to both analysis and interpretation of findings according to Somekh and Levin (2005)

There are many approaches to reflexivity and various typologies are outlined in Finlay and Gough (2003). Selection is related to the philosophy and methodology of the research in question. In this thesis, guided by critical hermeneutics, I acknowledge that interpretation of meaning will be influenced by the constellation of influences on my life. I am not a neutral reporter but a conduit and as such will import personal issues to any analysis and evaluation of meaning about learning and education in later life. Nevertheless, findings are co-constituted through exploring personal meanings and shared meanings, and this added complication links introspective reflexivity and reflexivity as social critique (Finlay and Gough 2003). Reflexivity can be criticised for perceived indulgence where the researcher’s voice may occlude that of the participants and also for the infinite regress found in some deconstructive approaches. I attempted to deal with those challenges by employing critical self-analysis throughout the research process, which was mediated through supervision, peer feedback and acting on responses to my presentations of work in progress.

During the entire research experience I kept a reflective diary. I chose to describe this process as reflective rather than reflexive and the intention was to record my unfolding perceptions about all activities associated with the work. Discursive passages, memos and concept maps filled the pages of this journal as I explored a route through the unfolding process. I used the structured model of reflection outlined by Johns (2000:47) which provides a way of “looking in” and “looking out” using

cues to focus attention. In exploring the amalgam of personal and professional values, beliefs and motivations imported to this thesis, I chose the work of Wilkinson (1988) as a template for analysis. Her seminal work in feminist studies transferred well to analysis of work with older people where shared beliefs of invisibility within society can be found. She divided her analysis of reflexivity into three inter-related components namely, personal, functional and disciplinary. Personal and functional reflexivity explores the researchers' identity and the research process while disciplinary reflexivity has a more political edge and investigates the influence of the chosen methodology (Banister et al 1994).

Selected issues related to personal reflexivity or "older people are still helping me"

It is not difficult to trace my interest in older people or locate my affinity with this generation. I was brought up in an intergenerational household on a small-holding in rural Perthshire. My family comprised maternal grandparents, and my mother at various times during my childhood, aunts and uncles also lived on the farm. My parents had separated before I was three months old and upon their subsequent divorce, my grandfather became my legal guardian. I was not to meet my father until I was forty years of age. The remote geographical location and the structure of my family resulted in me developing more intergenerational communication skills than peer group skills as a child. My mother's goal was to enable me to "make something of my life" and her persistence created a schism. While she doggedly persisted in tutoring me in writing and mental arithmetic that did not evoke joyful responses from me, my grandparents taught me about lambing, sowing, harvesting and countryside folklore. She was focused upon my future, they were focused upon my context.

Alongside other children in the locality, I learned from older people how to dance, bowl, sing in a choir, play musical instruments and contribute to community life. Long before the concept of social capital was named and framed, communities such as this co-existed on the principles of intergenerational learning and reciprocity. Without question, this was where I learned to comfortably interact with older people, to seek information and to respect their position and contribution. However, in later years I became aware of my tendency to halo the experience, and to

under-acknowledge the harsh reality of farming life experienced by my mother, aunts and uncles. It took time to balance positive memories of my upbringing and that particular core theme in my life with disadvantages of rural living which led me to leave at age seventeen. Nevertheless, one insight that has occurred to me as a result of personal reflexivity is the notion that older people are still helping me. Unconsciously, I have stayed close to situations which echo my earlier life.

I consider that this heritage shaped my professional interest in working with people two generations removed. Nevertheless, as a legacy of those experiences, there have been episodes within practice when I have been entangled in transference and counter transference situations with older people, the genesis of which originated in my early life. Those terms emerge from psychodynamic practice where transference occurs when “inner representations of figures from the past become superimposed on the image of the therapist” and in my situation where older people would relate to me as a favoured child to be mentored or helped (Brown and Pedder 1979:62). Counter transference happens when the therapist imports his/her own agenda onto the therapeutic process. In this scenario, I might be over protective towards older people in my capacity as an occupational therapist and confuse professional with personal agendas. Within some of the narrative interviews when participants became distressed, I experienced the same wish to protect rather than explore the reasons why early educational experiences had been negative. In addition, when I interviewed Participant 6 in the same month that my mother had died, it was comforting to be in the presence of a warm, competent older woman in her home. My reflections about that interview reveal this positive transference for example “I enjoyed this time with (Participant 6), and the time went very quickly”. In the spirit of reflexivity, those phenomena are not negative features to cause alarm or avoidance but instead they become tools for exploration and increased understanding. I find yet another conceptual echo here. Whilst working as an occupational therapist using a psychodynamic approach, professional supervisions sessions might focus upon the location and impact of self within the therapeutic process, and now within a research process, I am working with a similar phenomenon but calling it reflexivity. As Wilkinson (1988) emphasised, life experience is a valuable resource for research but this reflexivity also feeds back into life experience.

The more immediate insight from personal reflexivity is that I am now aged 56 and in the Third Age according to the definition given by Laslett (1989) and Jarvis (2001). I am beginning to consider and plan for retirement and as such have a vested interest in understanding and learning how people older than me recount their experience. Vocational learning and education have been part of my life for more than thirty-five years. I am attracted to the philosophies of the University of the Third Age and learning for self-development rather than instrumental reasons. My current disenchantment with the commodification of education and the emphasis on learning without any mediation through the art of teaching perhaps resonates with responses of the participants. In turn, it shapes how I interview and interpret responses.

In consideration of my personal and professional life, this thesis synthesises personal and professional leanings. While I found it challenging to review my own agenda in relation to the research process in this reflexive manner, I have acquired new insights into the research process. They are in the spirit of critical hermeneutic exploration, whereby the vantage points of the researcher are part of the interpretative process and as such need to be explicit. Hidden meanings can impede the thinking and practice of the researcher and this leads to an exploration of functional reflexivity.

Selected issues related to functional reflexivity or “the challenge of co-learning”

Functional reflexivity relates to my specific role as researcher within the thesis, the relationship between myself and the participants and analysis of power differentials concerning the degree of collaboration involved in the study. Here the concept of “other” is important in exploring how older people are represented as different. Examples from the collective group experiences will be considered first followed by analysis of one selected exchange from reflective notes taken after an in-depth narrative interview.

In the design of this research, I wanted participants to be informed and involved throughout what I conceived as a democratic process. Nevertheless, my analysis of themes within the research diary reveals a tension between my need for control, co-operation with participants and where collaboration actually existed. Interestingly, my impact upon the research process was conceptualised by the

participants as “so well organised”, which could be interpreted as a means of managing anxiety within unpredictable situations and as a means of containment of the process.

From the onset, in the first focus group, I was preoccupied with organisation and control. I wrote “the issue of collaboration also needs to be clarified – because it still feels like they desperately want to be co-operative”. I perceived their wish to help as indulgent rather than critical but had not discussed the means by which more formal collaboration could occur. This theme follows through into the first focus group with my preoccupation with the group task. Phrases that convey this are “I felt intuitively that I had to steer this back to policy” and “the usual task versus process argument in groups was on my mind”. I dictated the nature and pace of the group by moving them through the task, which was to explore lifelong learning policy. While this was the research aim, my preoccupation from the reflective notes seems to be with group content more than group process.

As I prepared for the second focus group, I noted “again, preparation for the group needs to be carefully organised. The group needs a clear focus”. This group was qualitatively different from the first encounter. The dynamic here was that I was party to individual stories but group members only knew their own story together with the documented form of this story in the transcript. Elements of the power that therapists have within group settings were being enacted whereby I had insider knowledge but the group only have what people wish to share. Disquiet with their own stories as “gobbledegook”, “horrified by the omissions”, or only palatable if it was considered “as someone else’s” reveals a little of their anxiety. Participant 9 clarified the situation for both the group and myself by her statement that “the amount that had been written showed that people had been relaxed in the interview”. Towards the end of this group, they asserted their own agency where Participant 1 suggested and they agreed that she could construct a title for the group story by combining all the titles for individual learning stories.

Researcher/participant relationships continue to be negotiated in the third focus group, where as already agreed Participant 1 would share her perception of the group story. She offered two titles, which the group had to choose between but my notes and the transcript reveal that I precipitated that

choice. “Lifelong learning a work in progress” was actually challenged by Participants 8 and 9 because of the difficulty of pursuing extra learning or work in progress opportunities due to lack of funding. Nevertheless, the group resurrected their own sense of agency. While politely responding to my questions, they actually pursued their own agenda about aspects that became central to their agenda, for example, finding out about new learning opportunities as an alternative to “activism in the older peoples movement” (Participant 8) and interest in gender issues (Participant 4). My control of the group was lessened at this point as Participant 8 agreed to gather his colleagues’ reactions for the Postscript. Upon reflection, this might have been part of a developmental process in the group and the initial control/containment was necessary for the emergence of group agency. Nevertheless, understanding the links between facilitation, representation and power is a reflexive responsibility.

Conducting individual interviews creates another potential situation of power inequality, whereby the researcher asks questions and the interviewee chooses the responses but seldom reverses the role and begins to ask questions. This differs from the group situation where more reciprocal communication occurs between members. In the narrative interview with Participant 7, the first dynamic was the context that she chose for the interview and her intention perhaps to meet me on her terms in territory where she has a place and an important function. She chose the Centre that she volunteered in, and the interview was preceded by a tour of the premises where she introduced me to staff and people who used the facilities. It was clear that she had an established role and position. Material from my notes state that as we settled in the room that she had booked, “Participant 7 was nervous and wanted to get started quickly – no small talk as had been the norm in other interviews and there were no notes or aide memoirs”. A no-nonsense, down to earth approach was taken. Whilst other locations had included the participants’ own homes or either of the campuses at my site of work, this was an interesting alternative. The interview was characterised by short factual responses for the first twenty minutes of the exchange despite my efforts to expand her narrative. My mismanagement of her responses seems to convey unease about the relationship, the setting and negotiation of the subject matter as the following sequence reveals:

L.1 SB “so you have very little spare time?”

L.2 Participant 7: “very little”

L.3 SB “Gosh, yes. You went to night school - and night school has been a common experience for a lot of people that I have been talking to. Did you do any kind of learning or certificated learning?”

L.4 Participant 7 “No”

L.5 SB “So, night school and then you got – was it a Diploma in Shorthand and Typing?”

L.6 Participant 7 “well, it was a certificate really and I got up to 120 words shorthand and 80 words typing”

L.7 SB “when you look over your life what kind of learning did you enjoy most?”

L.8 Participant 7 “ehmm.....pause.....I’m not terribly sure if I could answer that.....what type of learning? I think by example you know, I quite enjoy reading as well.....I wouldn’t say research, I would not be against research, but I have not done a lot of what I would think of as research”

In this research encounter, I appear to be both patronising (L3) and inattentive in this exchange (L7) where I show no acknowledgement of her skill as I pursue my agenda, and interestingly, she goes on to comment tangentially on my agenda of research as something she would not want to get involved with. As Gough (2003:159) maintains, reflexive practice presents many challenges for the qualitative researcher, but close attention to detail can reveal positions that the researcher adopts which may facilitate or constrain the relationship and subsequent process. Thus, as the examples convey, attention to functional reflexivity is concerned with different identities and interactions between participants and researchers. It is closely related to personal reflexivity whereas disciplinary reflexivity is concerned with more macro analysis of the nature of the chosen research methodology and its relationship to change.

Selected issues related to disciplinary reflexivity or “theoretical challenges”

This aspect of reflexive analysis is concerned with critically evaluating the chosen philosophical and methodological approaches and situating them within broader social debates. A critical hermeneutic approach concerns interpretation of meaning, which implicitly promotes change but does not employ emancipatory methods. It occurs at the conceptual level of raising consciousness within and between the interviewer, interviewees and audiences for that particular work. Although this situation of “talk

and no action” was criticised by participants, Lather (1986) argued that critical hermeneutics can help in transforming the social world. It is known as the interpretation of suspicion because there is a quest for hidden meanings that are unknown to either participants or researcher until a process of interpretation and reflexivity occurs. Ways of exploring and critically reflecting on meaning in this study included:

- negotiating meaning with participants in focus groups
- using a sequential approach, which allowed the topic to be revisited over the course of a year
- use of multiple methods for collecting findings.
- participants’ stories gave insight into changing educational practices from the 1940s to the present.

Critical hermeneutics holds that there is a history in the generation and development of meaning for a group and with each interpretative act, new meanings evolve (Thompson 1990). Also as the social gerontologists, Phillipson and Biggs (1998) have shown the historical vantage point provided insight into the evolution of a particular discourse, in this case the way that later life was socially constructed and how this eclipsed the rights of older people to learning and educational opportunities. This group of lifelong learners may well be amongst the harbingers of change for older people in their wish to learn how to analyse policy, construct arguments and formulate a case for varied provision as an issue of equality. In this way they gain purchase on policy, theory and practice. A hermeneutic approach reveals possible meaning inherent in the patterns and tensions emerging from findings. Amongst the meanings revealed as a result of the process of exploration and interpretation were:

- The dynamic of “othering” and participants’ separation at times from older people who did not want to engage in the same activism
- Adhering to particular scripts concerning learning and educational capacity which served internal as well as external purposes
- Social influences on life chances
- The strong links between learning and identity in the meanings attributed to achievements or situations where aspirations were not fulfilled

- Maintaining the status quo by resorting to their own solutions for learning opportunities which corresponds with the dominant ideology of individual responsibility.

However, disciplinary reflexivity involves a critical stance about the place and function of a piece of research within broader debates about theory and method (Gough 2003). Phillipson (1998) reviewed changes to the experience of ageing over the last fifty years and called for a reconstruction of later life and a new sociology of ageing. The impetus for such a revision of ideology was due to the dismantling of institutions supporting later life such as the welfare state. A new vision and purpose was required particularly to deal with the social exclusion of older people ideologically, economically and politically. This vision has been slow to materialise in the intervening eight years although change is evident in research partnerships (attempted in this study) that strive to represent the voices of older people. It has become clear through the findings that challenges are still needed to the notion that older people are a homogeneous group, that they want to politely disengage from society and that they have no need or occasion to require learning and educational opportunities. As argued by Aspin and Chapman (2000:17) lifelong learning policy fulfils only one of the “triadic” purposes for lifelong learning, namely economic progress and development. The outstanding omissions are “for personal development and fulfillment and for social inclusiveness and democratic understanding and activity”.

While this is not the only epistemological stance to achieve these research goals, I chose a critical hermeneutic approach because it served to analyse and raise consciousness about perceived oppressive practices that occur in policy, research, theory and practice whereby older people are rendered invisible and have minimal purchase upon political change. Research in this tradition has the potential to decode powerful messages about values, rights and identity concerning older people and the opportunities afforded to them in learning and education. What this section of the thesis has taught me is that the prefix of “critical” before the constructs of gerontology, educational gerontology, or hermeneutics does not guarantee that change will occur but it does provide the means for raising consciousness. Understanding powerful themes within society is the key aspect of critical social analysis prior to informed action.

Chapter 5: Discussion of findings

“It is the man who stops learning, whether he is 20 or 80, who is really old” (Henry Ford 1934)

This quote is used as a preface to Part 2 of *Life Through Learning Through Life* (2003:16) which establishes context for the policy. It is one of five brief references to later life within the policy, four of which are concerned with retaining people over 50 in the workforce. The words are intended to inspire and promote a lifelong approach to learning but there are troubling links between ceasing learning and being really old in the message. An interpretation of the message could infer 80 as a learning ceiling. Also, the gendered ethos of the quote has not deterred writers from choosing it to make a conceptual point. I am disquieted at the choice of quote and that it is considered a legitimate point of principle upon which to focus attention. It contains a powerful hegemonic message and imparts dubious ideas about learning later in a policy document designed to encourage learning throughout life. As a means of introducing tensions, dilemmas and debates about the broad policy context for older learners it serves to introduce the penultimate chapter for this thesis by revealing continued ambivalence about the actual length of lifelong learning.

This section of the thesis is closest to the exploration part of Hernadi's (1987) hermeneutic triad, wherein I attempt to discuss what the findings might mean and construct my perspective of learning and education in later life. My aim as outlined in Chapter 1 was to explore the nature, meaning and purpose of learning and education in later life from the collective and personal perspectives of older people. Four objectives were designed for execution of the study. This chapter deals particularly with number four and discussion of the impact of the selected lifelong learning policy, its context and how personal narratives about learning and education are juxtaposed. From analysis of findings in Chapter 4, a selection of material is chosen for discussion based upon the substantive themes emerging from the focus groups and the narrative interviews.

- Section 1 commences with discussion about the impact of *Life Through Learning Through Life* (2003), on this group of older people.
- Section 2 critically discusses key thematic findings from the study with particular reference to the meaning of learning, learning identities and the notion of learning lives being “work in progress”.
- Section 3 evaluates strengths, tensions and limitations of the study.

Section 1 Impact of the policy - promises unfulfilled

Scotland’s population is ageing and shrinking (ESRC 2004). It is an issue unique to this country because no other European Union country has experienced such population decline. This situation has ramifications at all levels of civic society. Although it is too simplistic to equate greater numbers with potentially greater influence, Walker (1998:3) contends that the “politics of old age in Europe have begun a transition from consensus to a more conflictual approach”. This contradicts Higgs’s (1995:548) earlier view, written in the context of structured dependency and citizenship issues in old age, that the “likelihood of a politics of old age developing are small”. While not as strident as contemporaries within the United States, older people across Europe are becoming more politically active according to Walker’s overview of trends and participation. It is at the level of local authority that he considers older people will be involved and working in partnership to shape local interpretation of policy. This has been a positive outcome of lifelong learning policy in Scotland with the formation of Community Partnerships and Community Learning Plans. Two participants had been involved in discussions about such plans in their localities.

Walker (2001) believes such participatory activity to be a result of the present climate of more open government. Indeed, he was so optimistic in his address at the ERSC launch of the Growing Older Programme (2001) that he stated that never had the national and international policy context been so propitious concerning older people. This positive view may be borne out by the fact that even within a small group of nine older people from across the central belt of Scotland, seven of them had been involved to some extent in consultation forums such as *Better Government for Older People* and two had been asked to comment upon lifelong learning policy. Although involvement from such an active group may not be surprising, why did the nine people in this study feel so excluded and let down by this document? It is possible that their expectations of government were too high.

However, those expectations equated with the hopes of educational gerontologists and there appears to be scant resonance between their vision for a life course approach to lifelong learning and the text of the policy in question. The first promise of lifelong learning lies in a title that implies a lifelong phenomenon and that the means to facilitate learning may accompany the raised expectations. Those expectations not only resided in the hopes of this group of people but perhaps were also aligned to the beliefs of writers such as Ranson (1998) and notions of the learning society. Certainly, exponents of educational gerontology had hoped for integrated policies. In the United Kingdom, for example, Withnall (2000) attempted to forge a link between educational gerontology and lifelong learning as a way of promulgating learning more than specific educational opportunities for older people. While this synthesis of values has merit, it has remained a hope rather than a reality in terms of targeted resources.

Participant 3 voiced the perception that the notion of open government was an illusion and that consultation was tokenistic. "It's all talk and no action" was his mantra. Contemporary lifelong learning policy in Scotland promises much but fails to attend to the breadth of learning and educational needs of the fastest growing segment of the population. In response to using this policy both to establish a research context and as a research method, this was the prevailing perception of the group of people involved in the study as evidenced through their reactions in the first focus group where the over-arching theme was exclusion. Despite a discourse of inclusion, active citizenship and personal fulfilment within the policy, the emphasis as analysed by the participants was upon employability, economics and associated adaptability to vocational change. Lifelong learning policy is posited as a means of managing complexity in a society characterised by rapid social, technological, demographic and economic change – but only for those in employment. It extols the virtues of learning as a guiding principle for self-development and competitiveness in employment and as such provides the passport for social inclusion. In this respect, little has changed since Glendenning (2001:68) reviewed two decades of education for older adults and noted that the Labour government's White Paper on lifelong learning in 1998 reinforced the view "that older people were marginalised in educational policy circles".

Discussion of possible underpinning theoretical ideas

Analysis from a political economy perspective might suggest reversion to the structured dependency ideas of later life whereby lack of resources results in low participation in society and hence exclusion (Townsend 1981,1986; Higgs 1995). This possibility appeared to be intuitively experienced by the group of participants and given voice within the focus groups and the Postscript. The associated risk is perpetuation of the polarised stereotypes of older people between the deficit and passive personification or the heroic and active image (Joseph Rowntree Foundation 2004). This is a prevailing dualism, which this group condoned in their conscious separation from “older people” at various points within the focus groups. They were keen to identify with and perpetuate the heroic image and discourse about older people. Amongst the criticisms of a political economy of ageing perspective, within which resided the concept of structured dependency, was a disregard for the individual agency of older people to challenge the implications of exclusion noted by Giddens (1991) and Phillipson (1998). Resistance was evident in the actions and narratives of the participants and it is important to stress here that the group did not restrict their evaluation to the experience of older people. They also realised the broader implications for younger people. Those particular findings from this study endorsed Young and Schuller’s (1991) view that there was a perceived link between older and younger people in terms of disadvantage and marginalisation in society. Nevertheless, the older people in this study experienced an uncomfortable dilemma whereby they could challenge perceived injustice within consultation forums and urge policy reform but in the meantime a full and holistic interpretation of lifelong learning policy remained untenable because of sparse resources.

The policy can also be interpreted as promoting a functionalist view of ageing whereby old age is perceived as an issue of socialisation, and operationalising the policy would integrate a growing group of older people successfully into a brave new world. Practical suggestions were restricted to encouraging people over 50 to stay in the work force or re-skilling older people through information technology. Education from this viewpoint is about training and maintaining the status quo. Battersby (1993) borrowed a term from Freire (1972) when discussing the constraints of such conventional paradigms of learning and education. He refers to the “banking model of education” and his concern that it contributes to the commodification of education. Certainly this particular

ethos is evoked within the language in *Life Through Learning Through Life* (2003) with use of terms such as “stakeholders” and “efficiency targets”. The caution expressed from critical educational gerontologists is that the learning and education in this form is based upon “instrumental rationalism” within which the voices of older people are eclipsed as explained by Battersby (1993:20).

Although the policy implies inclusion through vocation it also stresses the values of active citizenship, inclusion and personal fulfilment. It was those social virtues of learning and education that this group of older people connected with and they perceived themselves as active citizens who all contributed wholeheartedly to their communities by involvement in a wide range of voluntary activity, as outlined in Appendix 2. Narrative accounts attest to this involvement. In addition, one member had continued paid part-time work and two others participated in ad hoc employment such as working at polling stations during elections. All were or had been active in what they called “the older people’s movement”. This occurred through their involvement in local senior citizen forums, as senior health mentors within Living Well projects or as advocates or mentors for other older people or they had been or were still involved with the RBS Centre for the Older Person’s Agenda. This Centre appears to be unique in Scotland in focussing upon a partnership model with older people in generating knowledge about policy, practice and research. In short, these groups of older people are not passive recipients but active contributors and collaborators in civic affairs. The point is they feel excluded from a major piece of policy.

Their sense of disappointment in the policy and exclusion from its purpose was clearly evident in the first focus group meeting, and this feeling and perception of invisibility and marginalisation at policy level was sustained throughout the study. It was resurrected in the Postscript. Contrary to the expressed intentions of the policy, the group perceived social exclusion because of their age and the fact that they were not contributing economically to society. It was the first point at which attention to intergenerational issues was raised with one member of the group exclaiming, “that policy excludes at both end of the life-span”. The collective perception evidenced by the thematic analysis was that exclusion by omission in the policy was but a short step from exclusion from society. Even when positive possibilities for a different kind of learning and educational experience was proposed through

the auspices of *Better Government for Older People*, such as the Ransacker's initiative, funding in Scotland had not accompanied the promise and had left one enthusiastic recruit feeling disappointed. She (Participant 9) had already planned an area of study concerning the economic problems experienced by older people who had bought their council houses in the 1980s. Considerable lobbying had accompanied the desire to experience this type of learning. Local councillors and politicians had been contacted without success.

Theoretically, Phillipson (1998:138) argued that there was a need for a new conception of later life and "a sociology of exclusion", that focused on "the way in which identities in later life are controlled and managed within the dominant social institutions". His outline of four types of exclusion connected with the experience of this group. One type was ideological and related to demographics, the second was economic and related to the pension crisis, and the third was political and concerned social justice issues of representation and the fourth concerned affective exclusion where the emotional needs of older people were ignored. Those factors represent a challenge for social gerontology but also for critical educational gerontology to foster empowerment of older people within such contextual constraints.

After three focus group meetings concerning issues of learning and education in later life, this group was left feeling that the policy discourse of learning for all across the lifespan was at odds with their perceptions and experience. They did not experience the policy as inclusive despite believing themselves to be the kind of active citizens through their civil and voluntary activity that lifelong learning was supposed to engender. While the group considered that the policy had promise, for them as people with a mean age of seventy-two, its promise was unfulfilled. New European Parliament recommendations "to make it possible to relate the lifelong learning programme to practical, everyday social needs as well as the needs of the market" perhaps recognise and acknowledge their perceived disjunction (European Economics and Social Committee 2004:8).

The feeling of exclusion resulted in an intuitive response by the group to "take stock" and "move on". This was done by using their own personal and local resources to maximise low cost learning

alternatives such as U3A, local library book groups or non formal learning such as preferred reading, radio or television. Community education did not feature as a possibility for this group and a number of participants viewed provision in their areas as solely recreational or concerned with Adult Basic Education. Similar to the findings of Carlton and Soulsby (1999) this group was motivated to continue learning by a desire to keep well and involved with their local communities. They exercised personal and collective agency towards continued learning, which often was situational and informal. Nevertheless, their experience may correspond with findings gained from annual surveys for NIACE in England (Alridge and Tuckett 2004) which indicate that the vast majority of older adults have not accessed any form of learning. Withnall, McGivney and Soulsby (2004) acknowledge the difficulty of equating minimal participation with requests for targeted provision and at the moment despite growing numbers, older people would appear to be regarded as non-viable stakeholders.

Nevertheless, for this group the “story” was not over; rather they represented “work in progress”. Participant 1 reminded me at the final presentation to the group that I had to seriously “rethink the idea of older people as being large in number but low in influence, because there were now more groups of older people who sought representation” and that I needed to emphasise this in my thesis. The sentiment endorses the views of Jarvis (2001) and Elliot (2000), who considered that later life can become a time of intellectual growth, and also Walker’s (1998:13) proclamation that the new politics of old age in Europe is characterised by a move from “acquiescence to dissent”. When asked about changes they would like to make to the policy, they had no hesitation in suggesting that attempting to view messages about later life as implicit within the document was implausible and that there needed to be a specific section dealing with post-work issues. Their knowledge of possibilities outside Scotland included European initiatives and Denmark was noted as an enlightened country in this respect. They also endorsed a revised conception of lifelong learning towards a life course perspective.

Findings revealed that this group of older people, contrary to popular myths about capacity in later life noted by Finsen (2005), could analyse, evaluate and make recommendations about policy. This group advocates for and helps raise the critical consciousness of their peers. They want to gain

access to reasonably priced learning and educational opportunities as equal citizens. As such, exclusion becomes a social justice issue, and educational gerontologists such as Battersby (1993) and Elmore (1999) have argued that this is the fundamental moral challenge.

Section 2 The meaning of learning and education in later life, learning identities and the idea of being a “work in progress”

A hermeneutic approach to inquiry searches for meaning within findings and critical hermeneutic perspectives raise consciousness related to those meanings for both participants and researcher with reference to social context. In this study, the meaning of learning and education was the principal focus of the second group. The over-arching themes within this group were about “taking stock” of learning and education in later life. In addition, narrative interviews produced themes associating learning with identity. Further exploration of participants’ narrative evaluations linked meaning with social issues, turning points particularly retirement, a renaissance of the learning self and a lack of closure in their learning and educational narratives. Meanings about learning and education in the lives of this group of older people were rich and varied. Biographical accounts of learning helped provide a sense of perspective and insight into perceived supports and turning points in learning. As Randall (2002:56) noted “ageing is also a hermeneutical process” which blends meaningful events and circumstances. The process also facilitated participants to reveal their own resilience to transitions and changing identities similar to the findings of Houtt (2005).

Participant 8 considered that education should be about “leading out” and he eloquently described the qualitative difference between his traditional formal education which in his view was about “putting in” knowledge. This was about transformation of perspective and thinking in different ways akin to the work of Mezirow (1991). Likewise, Participant 4 in the same group considered that “[learning] teaches one to analyse.....and to doubt.....and to be critical, and to think twice about making a statement”. Those perceptions link with the essence of Mezirow’s work in adult education, which was about negotiating meanings and becoming critically reflective. For this group of people, the crucial difference about the quality of learning in later life was increased reflection and a wish for social interaction and group learning. They preferred learning together in a reflective and collegiate

way and in this respect, the year-long activity seemed to have both personal and collective salience as evidenced in the Postscript. Emphasis was placed on the fact that they did not want to learn for instrumental reasons and “bits of paper” but for self-development and fun. Nevertheless, the quality of education offered by any agency had to be what they considered to be of good quality. Participant 5 in particular forcefully exclaimed that because older people paid less or accessed some educational opportunities free, that was no excuse for poor teaching.

Meaningful learning

Some sympathy with this view is evident in the work of Courtenay and Truluck (1997:176), who believed that although educational gerontologists have recognised that older adults were interested in meaning, they have not “identified instructional techniques that are effective for learning about the meaning of life and ageing”. Those authors together with Moody (1993) believe that older people transcend difficult transitions by constructing new views of self and that the key is to explore the individual’s view of the world through learning. This was my intention in using Labov’s approach to narrative analysis because it provided insight into individual meanings together with awareness of the social context. Obsolete personal assumptions, for example about worth linked to work, or that in later life learning is difficult, can be replaced with revised assumptions, which promote personal growth. Two types of thinking, namely initiation and induction are encouraged in Courtenay and Truluck’s approach, both of which facilitate interpretation of meaning. New ways of thinking assist in shifting particular blocks or stances but such transformations can be problematic. At any time within the life course, changed expectations accompanying new learning can impact upon family and personal relationships. This was an issue that Participant 2 constantly reminded the group about in terms of balancing responsibilities between a quest for self-development and family commitments.

Investment in the research process was a key feature of this experience. Reviewing their learning and educational stories in relation to the present had meaning related to self perception and self esteem. Also, increased reflexivity, which Edwards, Ranson and Strain (2002) considered to be a pivotal aspect of lifelong learning, was epitomised in this group. In the narratives there are examples from every participant indicating the capacity for reflective and reflexive thought. For example Participant

5 reveals this critical self-reflection in a number of narrative moments within the interview concerning her characteristic lifelong theme of frustration about her perceived unfulfilled learning potential. She now pondered the extent to which she scuppers opportunities and is too hasty in her reactions. Meaning for her in this endeavour was risky in testing out such a proposition, which may have been painful. Interestingly, it was revealed in the interview rather than the group.

Moving on

Over the year, the experience of learning together also helped four members to lessen their hectic involvement with forums and committees and to seek advice from others concerning U3A and where “to learn for learning’s sake” as noted by Participant 8. For others, however, there was a transition into a more socio-political involvement related to the work of the RBS Centre for the Older Person’s Agenda whereby they would develop personal research agendas and travel to other countries to explore partnership working in 2005. In many ways the group acted as a safe space to explore the possibilities of moving on in their lives in terms of learning, volunteering or lessening ties with more political activities. This fluidity of meaning and action was an important learning process for individuals and the group. It seemed to correspond to the ideas of Glendenning and Battersby (1990), who had postulated that education for older adults should be about enabling them to gain more control over their lives. This discourse of empowerment within critical gerontology is frequently aligned with a politically active stance but in this group, it equally applied to the political decision to disengage from an activist role. Percy (1990) had been concerned about the emphasis on critical consciousness-raising approaches for education in later life, arguing that education for older people was no different from the purposes at any other stage of life. A humanistic perspective of personal development and self-fulfilment was also inherent in the work of Laslett (1989) and Jarvis (2001). It seemed to be the learning trajectory that the group wanted to go in. Interestingly, for this group of people, the active political stances seemed to be important immediately post-retirement, for example in the case of Participants 1,2,5,6,8 and 9. It may have been a way of dealing with the transition of retirement, which was described as “traumatic” by Participants 1 and 2, but frequently resulted in a situation where lobbying or volunteering “got in the way” according to Participants 1,8 and 9 of desires to learn for other purposes. Ultimately, for two participants it seemed like an

extension of work and eventually this gave way to a wish to learn for self-fulfilment. One aspect that this conveys is that people learn for different purposes over the course of thirty to forty years after retirement and that a variety of opportunities and resources are needed. In short, a life course approach to lifelong education.

What is learning in later life for?

The point that learning and education in later life are for a great many purposes, and is indeed no different than at other stages in life, is embodied in the words of Participant 4. In the final focus group concerning the topic of what learning was for in later life he said “we hope to obtain from our studies some form of excitement to keep us alive spiritually and so on, and so we can understand the environment in which we live”. In those words reside themes of transcendence and practicality. Critical theorists might call this true praxis. It also endorses the pleas for wide-ranging opportunities. However, the functionalist argument that education is good for older people, keeps them healthy and as such less likely to be in need of economic or institutional support was an over simplification and remained a concern for Glendenning (2000). For him as an advocate of critical educational gerontology, functional approaches were about ameliorating rather than emancipating older people. Learning and education played a significant role in the lives of those nine people; it was part of their persona and they wanted to contribute to their communities in an informed way. Endeavours were self-initiated and on-going and would, according to Participant 1, “only end when I die”. While the literature is replete with reasons ranging from mental fitness to acquiring a new skill, the main issue is that motivations for learning in later life vary. It is also an argument for starting with what older people want to learn rather than imposing a curriculum.

Learning identities

Social gerontologists are interested in identity and the manner in which internal and external contingency combines to either contain or cause crisis (Phillipson and Biggs 1998). However, links between learning and identity in educational gerontology are more rare. There is currently a large multi-site study into learning, identity and agency (The Learning Lives Project) funded in the UK until 2008 (Biesta 2004). This work seeks to understand the reciprocity of living and learning

including all adult age groups. Atchley (2000:48) links identity in later life with continuity theory whereby general adaptive principles “allows change to be integrated into one’s prior history without necessarily creating upheaval or disequilibrium”. In his view, human beings seek order and continuity in thinking and experience. He offers helpful definitions of both self (which relates to what we think and feel about ourselves) and identity (which refers to aspects of the personality and self that the individual holds regardless of context). However, Polkinghorne (1991) believes that in an unpredictable world, identities may begin to fragment. In particular, he considers that older people may reify the past rather than reflect insightfully on events or find strategies to manage the present or future. However, this could be levelled at any adult in times of crisis and is not germane to older people although a propensity for reminiscence is a popular discourse about older people. Phillipson (1998:51) to some extent endorses this view within a sociological analysis of identity in later life. He considers that “achieving a secure sense of self has become one of the biggest challenges in later life” because the conditions for securing identity have altered and that while we are all troubled selves in the postmodern world, older people may be more vulnerable. This was noted in his analysis in relation to structural changes in work and welfare. He believed that the work of Taylor (1989) on modern identity was instructive concerning older people because it contends that frameworks such as religion or philosophical frameworks no longer mediate crises of meaning in the modern world. Problems with identity happen when people are no longer sure of their place in the world. Focus group and narrative content did bear out this possibility in relation to technology, the pace of social change and especially how older people were viewed by the rest of society. Even a group of older people with a strong sense of agency and identity experienced a sense of exclusion from society in terms of policy and practice. This produced a dynamic of “othering” periodically as they struggled with dominant cultural narratives of older people as dependent.

Within narrative interviews, the links with identity commenced from participants’ early experiences of schooling, which had established certain thematic continuities that were difficult to shift. While many positive and enduring factors had emerged from early schooling, negative internalised learning identities were problematic. For example, Participant 2 witnessed the “dyslexia script”, played out both with her own children and her grandchildren. In general however, analysis of the topic-centred

narratives about learning and education permitted insight into how core themes, patterns and metaphors had emerged and were sustained. One example was the perpetual narrative of mediocrity, which had progressed from school to the army to work for Participant 8. According to Cohler (1993:116) “later life becomes the testing ground for the success of our personal and collective search for narrative integrity”. This may account for the preoccupation with “setting the record straight” in member checking activity shown in Appendix 3.

Kaufman (2000:103) linked the idea of identity in later life to the emergence of themes that were situated in older people’s experience, contexts and value systems. Those themes “integrate these three sources of meaning as they structure the account of a life, express what is salient to the individual, and define a continuous and creative self”. This idea links with Polkinghorne (1988) and is about the constant creation and recreation of identity over the life course. She believes that the older person actively seeks continuity, which is not so much chronologically ordered but symbolically ordered according to the meanings created and invested by the individual. This intriguing set of ideas helps to explore and analyse the way that participants devised titles for their learning stories, selected particular incidents from their learning and educational histories and constructed particular narrative plots. From Table 3 in Chapter 4, themes of continuity can be detected from Participants 1,3,4,5,6 and 7 while themes of turning points and transformations are revealed by Participants 2,8 and 9. In Participant 6’s title there is the notion of awakening to the learning potential in “service to people”.

As a unit of analysis, Kaufman’s thematic notion of continuity of self and identity is also helpful for understanding the dissonance between reality and the central themes related to identity. It is the theme/s, which keeps identity intact, not the actual reality. Again, this can be heard ricocheting throughout the nine narratives for example in Participant 3’s view of himself as an *agent provocateur* negotiating a route through the “rocky road of life”. He scaffolds and establishes the theme successfully and other members of the group began to relate to this perception, but close reading of his learning story does not reveal the same perceived learning or educational turbulence. It is the theme that maintains coherence of identity for this participant. Although social gerontologists suggest that identity crises in later life are rare, vestiges of such a possibility are evident in the

narratives about retirement and the subsequent shift in valued roles. It can be detected for example in Participant 5's disjunction about wanting to be involved in voluntary work because it fits with her identity script and her disenchantment with certain voluntary organisations. Nevertheless, her adaptive mechanisms can be seen in action where she reflects upon the advantages and disadvantages of certain voluntary positions and decides that she needs to choose carefully. Her working identity and core theme is about contribution to others and that is the constant feature stabilising her identity. Nonetheless, various facets of identity can strategically emerge at different times. Not only does life experience shape identity, the same person can have numerous identities, which are revealed or suppressed at different times. The essence of Kaufman's theory is that it is the interpretation of participation in the social world that enables identities to be continually refashioned.

Discussion of the work of Connelly and Claudinin (1995:73) is also useful in this context of learning identities. While the emphasis on learning rather than education permeates the lifelong learning vision and literature, their work explores the idea of education as intrinsic to life. They adopt the idea of scripted lives, which is similar to Kaufman's central themes, and conceptualise education throughout life as a series of "cultivations, awakenings and transformations". When viewed alongside the participants' own descriptions of their learning lives in Table 3, the titles of Participants 2 and 9 learning stories are about learning and educational transformations in later life whereas the others cultivate existing learning shifts made in adulthood. Connelly and Claudinin's work links precisely however with Participant 5's view of "Education is life" and that if something affects you profoundly it has educational implications. However, the caveat here is that the capacity for reflection on the event makes it an episode of learning. The fluidity of identity for this group was also apparent in the moving in and out of advocacy roles.

The future – the length of lifelong learning

Polkinghorne (1988:154) explored the idea of self through narrative and reiterates "that which differentiated a person from all other persons is a construction as well as a discovery, for the person's story is open-ended, not finished". Within the course of the year, participants were actively constructing futures linked with learning and education. I began to directly allude to the future in the

second focus group and here there was an interesting reaction. The group dealt with this by using humour. Participant 9 talked about the wish to be a “centurion” which was a reference to a newspaper cutting where a reporter had used this term instead of a centenarian. Participant 3 “wanted to be sued for breach of promise at 90”. The humour may have been a defence against uncertainty in the future or a form of ontological anxiety referred to by Cohler (1993). Participant 3 continued by saying “I don’t think I’ve got any ambitions in my old age really, that’s my problem”. The group seemed uncomfortable and did not pursue this line of inquiry. However, there were many practical references about how to proceed and advance their cause for rights to education and in particular how to access funding for educational opportunity by contacting their MP’s, MSP’s or lobbying the proposed Commissioner for Later Life when this position became available. Curiously, this was suggested by one of the participants who was indicating a withdrawal from this type of action. Groups often experience difficulties in considering the future, of disbanding as a group and of moving on in their own aspirations as they contemplate disengagement. It is easier to discuss practicalities or use humour than consider the emotion attached to the experience. Notwithstanding those explanations, Cohler (1993) in his discussion of ageing, morale and meaning proposes that an increased sense of their own mortality and finitude prompts older people to live in the present rather than project into the future.

Another issue is ambivalence about growing older and what this will mean. In the policy under review, older people are virtually invisible. The issues of inclusion and active citizenship have virtually no accompanying text and it is left to the imagination of those who implement policy as to how this will extend to groups who are out-with mainstream citizenship. Alongside this, however, is the ambivalence about ageing heard in the voices of the participants of this study both individually in their learning stories and collectively within the focus groups. Comments such as “bring on euthanasia now” from Participant 2 or from Participant 1 “when you tell them your age, their eyes glaze over” and her hope that education for her now will help her “sharpen up” seem to reveal a concern about growing older, the social relations of older people in society and how this affects status.

Another notion shared implicitly in policy and within personal views was that education may protect against the ravages of age or the need for expensive institutional care. While there may be some evidence for the link between learning and healthy ageing (for example Khaw 1997) it is one particular view of the benefits of learning and is something that concerns Minkler (1996.) The danger she believes that is inherent in concepts such as successful ageing, is that it can condone stigmatisation and disempowerment for older people “who fail to meet the criteria for ageing well” (Minkler 1996:473). Individual responsibility rather than societal responsibility for health becomes the problematic issue. It had seeped into the consciousness of participants though and at least four participants, and all of them women, made some reference in their learning stories about their motivation for participating in this study being linked to keeping well. For example, “as you get older, you become aware of what can go wrong with your mind and this was why I wanted to do it” Participant 7. Participant 9 said “to keep the brain active and to stay functioning for longer. I have visited residential care establishments and do not like them. I think that learning and health go together”. This can be interpreted in two ways, one as a self-initiated attempt to ensure wellness and the other as a fear-laden motivation for engaging in learning.

Section 3 Discussion of the contribution, potential tensions and limitations of the study

Links with other work

This thesis adds to the growing body of literature on research partnerships with older people such as Chambers and Pickard (2001), Leamy and Clough (2001), Withnall and Thompson (2003), Finsen and Carvallo (2004) and the Joseph Rowntree Foundation (2004) work. It also corresponds to the recommendations of the European Research Priorities in the Field of Ageing (2004) which urges the involvement of older people in research. The design of the study eschewed the distance between researcher and participants by devising tasks that the nine participants and I co-operatively engaged with. Shared responsibility was a key feature of the design, execution and part of the analysis of the findings. Nevertheless, my belief is that this was a co-operative and dialogical endeavour rather than a collaborative research project in the ethos of action research (Hart and Bond 1995).

Participants' views of the process

Participants viewed the experience as useful and valuable. I have described the experience in the focus groups elsewhere in the thesis as akin to a study group whereby participants tested out ideas and beliefs with their contemporaries. Participants described it as a liberating experience, and one that they embraced. Evidence for this view is revealed in the Postscript, which also highlights the fact that the group considered it as a continuous learning experience from the original Education for Participation course. Whereas in that role I was a facilitator of learning and acting as a paid consultant, in this situation I was a researcher and pursuing my scholarly interests. Nevertheless, the conceptual link is understandable because I was the constant factor in both and it is not strictly erroneous because the impetus for my thesis emerged from that original experience. As noted in the Postscript, "there is no doubt that the experience of these modules [Education for Participation] coloured the group's views" but the realisation that learning had transferred is important. There is evidence in the transcripts and in the Postscript that some participants were at first tentative about speaking out in the focus groups or felt insecure about constructing their narratives about learning. However, this quickly abated.

Innovative methods

The research method is unique I believe, of inviting older people to directly comment upon contemporary lifelong learning policy and revealing the lack of alignment between policy and their views. However, while the focus groups and narrative interviews were openly recognised by participants as specific components in the study, the synthesis between the political and personal was not embraced to the same extent. Perhaps this accounts for the final focus group seeming to reach a saturation point with the group wishing to embark on their own agenda. Alternatively, participants may have been painfully aware of the nature of exclusion that existed concerning older people within contemporary lifelong learning policy, and the group may have taken a conscious decision to draw a line under that phenomenon. Nevertheless, it could also be argued that this reflects the dual nature of the inquiry and specific vested interests. While I sought to reach conceptual synthesis of findings as a goal of my thesis, the group sought to find a forum for sharing practical solutions to their learning

and educational needs. This highlights dual agendas in any co-operative research process and is not a negative outcome.

Devising a means by which individuals could uniquely name and frame their learning story is also I believe an initiative unique to this study. Asking individuals to consider their experience as if it were a book for which a title was required allowed a form of projection and produced findings that would have been difficult to acquire by other forms of questioning. This evoked metaphors which Mallinson, Kielhofner and Mattingly (1996:344) in the context of health have described as “consistent recurring images that subjects use to give coherence to and aid in the interpretation of the events of their lives”. For example, Participant 8 uses the metaphor of “mediocrity” to describe his learning capacity, until the turning point in adulthood when he realised that he could be a successful learner.

Another contribution that the study has made is the substantial collection of learning and educational narratives, which richly convey the contexts, constraints, facilitatory components and outcomes of this experience over time. Those historical contexts do not only reflect a Scottish experience.

Participants had lived in locations throughout the United Kingdom and elsewhere, but all had been in Scotland for the last fifteen years. As Chapter 4 reveals, learning and educational experiences have been very varied for individuals despite some normative features outlined in Appendix 2. By no means did this group always regard learning or education to take place within a formal context.

Situated and informal learning was perceived as influential in shaping the kind of individuals that they became. As Giddens (1991:54) maintained, “a person’s identity is not to be found in behaviour, nor – important though this is – in the reaction of others, but in the capacity to keep a particular narrative going”. Although this group of people were resourceful and imaginative in seeking out learning opportunities and keeping a learning narrative going, this energy was constrained by policy which did not endorse Phillipson’s (1998:133) hope for education for older people becoming a “national priority” post-retirement.

The narratives that have been constructed about learning and education reveal fundamental feelings about identity, relationships that existed in times of hardship, people who encouraged them as learners

and how current interests in learning have been facilitated. Each story contains narratives rich in personal history but they also highlight issues concerning social relations and values about growing older. Since retirement, a Scottish experience is shared within the group and as such participants have much to say about power relations within society and associated policy. As the sentiment noted in the Postscript by one participant in the study reveals “I felt rejection when I read and re-read the policy”.

Potential tensions and limitations of the study

Practical issues

This multi-layered study required considerable planning and the dialogical process necessitated speedy analysis of material between phases. This was part of the partnership contract whereby I did some analysis, which the group commented upon, and this in turn contributed to the next phase of the study. For example, between phase two and three, there were only four months to transcribe and analyse the transcripts and I found it challenging to complete a thematic narrative analysis of nine transcripts which would provide my contribution and “the focus” for the second focus group. In retrospect, I consider that more detail was needed in the evolution of broad themes which seemed to be characteristic of this group. I leaned more towards commonality than the consideration of difference amongst the participants and as such may have imported an artificial homogeneity. As Findsen (2005) notes, there is a myth of homogeneity concerning later life and this group is as much characterised by difference as similarity.

I quickly discovered the difficulty of attempting a topic-centred narrative interview on this topic. Learning and education are intrinsic to lives, not separate from them. Also, the levels of emotion associated with recounting narratives were intense. Raised affect had been a feature of all interviews and four members had been tearful or close to tears as they recounted their stories. This required time and respectful handling of the material both individually and within the group setting. A level of trust had to be established. The fact that the group was small and at least five members knew one another from previous involvement did help. I also drew on professional skills of interviewing and group work to manage this situation. However, I was concerned particularly with Participant 2, who

seemed to be constantly reminded of learning distress as she witnessed her own children and then her grandchildren experience the same difficulties within formal education that she had. A long-standing fear of not achieving was continuing to affect her desire to attempt a module with the Open University. The concern here is that those are sensitive and problematic issues for participants and there is an ethical responsibility to act in the best interests of the participants. Tensions between acting as a therapist and as a researcher were present as I reflected-in-action about emotional reactions on a number of occasions.

Issues of power preoccupied me in terms of the dialogical element of this study. I designed the research, determined the pace and analysed the majority of findings. The way that I had attempted to minimise this was ensuring that enough individual time was given to individuals to consider my questions before each focus group. For example, letters of invitation containing the forthcoming questions for each focus group went out at least two weeks before the event. Despite attempts to facilitate a shift from my predetermined agenda, it was only in the final focus group that I became aware of saturation of the subject matter and polite acquiescence to my questions. The group had an agenda that was of more interest to them! In this case, they wished to explore gender issues concerning learning and education together. They also wanted to use the group as a place to voice their decisions about changing direction and to get advice about other learning opportunities. In retrospect, I felt that because collection of findings always ran concurrently with my analysis of findings, I may have experienced “tunnel vision” and should have left more space for the group to generate their own issues on the central theme. This made me re-evaluate the fine balance between co-operation and collaboration in this study. As the Postscript reveals, there is a strong wish to help me in pursuit of my doctorate and this may have occluded their agenda.

Issues of representation in qualitative research preoccupy many writers, for example, Mantzoukas (2004) in qualitative research generally and Lucas (1997) in the context of narrative research. On reflection, I acknowledge that despite my attempts to ensure that participant voices were respected and heard, I select the material to analyse, discuss and write about. Transparency was attempted through a number of methods such as dialogue with participants, an audit trail and member checking.

In my study, member checking occurred for the narrative interviews but not for the focus groups. I had considered this at the onset in the early stages of the design but had decided not to employ member checking for the focus groups because of the time factor and the increased workload for the participants. I had calculated that they would be spending between twelve and fifteen hours on my work and I was concerned about asking more from a group of busy people. In retrospect, this group was extremely keen to be involved in all aspects of the study, for example going to the trouble of accessing the full version of the lifelong learning policy and indeed other similar policies in order to give an informed response. Perhaps it would have been advantageous for participants not only to have member checked the transcripts of the focus groups but to have undertaken some more analysis of key themes. This would have intensified the dialogical process and outcome.

Another potential limitation concerns reconciliation of the social nature of the group and investment of individuals in the process with the short-term nature of it. Participants clearly thrived on the intellectual challenges it posed but also the social opportunity it offered as the Postscript reveals. I was concerned that expectations may have been raised and not sustained. This was an underlying theme within the final focus group. Projects were conceived and enjoyed such as *Wisdom in Action*, but not sustained because of lack of funding. Although participants were aware of the time boundaries of my study, many participants in this group had expressed the view that they were involved in studies but not kept informed of the outcomes. I had been conscious of this and had felt a commitment to the group to give a “work in progress” denouement. This was a curious session in which I had almost reverted to a teacher role and presented the findings to date in a quasi-formal manner, in contrast to the open dialogue of previous sessions. Participants clearly were also disengaging from the process and in the group and there were fewer interactions between members. Tuckman and Jensen (1977) describe this stage of group activity as adjournment and preparation for separation. A question and answer type of communication with me was most prevalent. There would be no other group sessions, so this one seemed characterised by acceptance of information rather than debate as the core dynamic.

Issues about the representativeness of this group

The representativeness of this group of older people was an issue throughout the study. It permeated supervision, the focus groups and it is also noted in the Postscript. The nine people shared certain characteristics as revealed in Appendix 2. They were interested in the relationship between lifelong learning policy and practice, keen to advocate for others and able to express their views.

Nonetheless, participants were disquieted when their representativeness was explored and I may not have sufficiently clarified the difference between the democratic and research meanings of representativeness. Certainly, no claims are made for this group of nine older people being a microcosm of all older people. So, this could pose challenges for the usefulness of the findings and potential outcomes of the study. "We are representative of ourselves" exclaimed Participant 1 in the second focus group. The editor of the Postscript also sustains that particular theme and notes "we are representative of a great many older people to whom this topic had relevance". This response crystallises the issue. Their stories are no more or less representative than anyone else's but they are particular to them and are valuable in that respect.

The question then becomes for whom is this topic and findings relevant? It has relevance for those like myself who are interested in and wish to promote educational gerontology. I also consider that it has relevance for the operationalisation of any notion of a learning society, which appears to be stratified according to a vocation specific discourse in lifelong learning policy. It also has relevance for older people throughout Scotland who want to undertake short courses such as Education for Participation and who seek the tools and strategies necessary for working in partnership.

Methodological issues

Difficult issues of synthesis have occurred in this study. Critical hermeneutics requires an analysis of the way that personal experience is juxtaposed with socio-political context, in this case in relation to debates about learning and education for older people. It requires analysis of how ideas emerge and how this shapes cultures and become implemented. In addition it requires awareness of the meaning of ideas that have become salient in society and why this has occurred. Individual histories merge with the evolution of ideas. This is a complex undertaking and the analysis of meaning at different

levels is problematic. The object of critical hermeneutics is to make the voices of marginalised individuals heard but I realise that this is a lofty and improbable aim for a study of this nature. It has however raised an interesting issue for this study. While Participants 8 and 9 who had previously been heavily involved in raising the profile of older people within many different levels of “the older people’s movement” had intimated their wish to depart from this activity throughout 2004, their desire seemed to gather pace towards the end of the year. By the final focus group, Participant 8 particularly was actively seeking information about U3A and seeking to find ways of becoming involved in “education for its own sake” and disengaging from the role of advocate and lobbyist. This study did not instigate this but seemed to fuel the interest in different forms of learning. Conversely, two other members (Participants 1 and 4) have embraced the possibility of taking a more active role in promoting the profile of older people in terms of research and international contacts. As explained by Lopez and Willis (2004:731) as “individuals become critically aware of the various positions they occupy in relation to other groups, they begin the process of liberating themselves from oppressive and damaging conditions”. While I do not think the experience of this group was an instigating factor for a switch of roles, I do think the possibility exists that it was sustained by the experience. Specifically the experience of being involved with a process that sought to examine self both in the present and over time alongside a learning and education system was potentially powerful.

By no means does that example constitute a disadvantage, but the point is that theoretically there are complex issues to be considered about change processes and how a piece of systematic exploration may affect the people involved. If the experience challenges and changes my thinking it certainly has the potential to change participants’ perceptions of learning and education in later life. It is not a neutral act to inquire into influences on learning and education over time or to invite comment upon the future for a group of people whose mean age is seventy-two years. That is the nature of co-construction and ethical issues reside in that act.

Summary of issues raised by the discussion

This chapter has dealt with selected issues from the findings in relation to the aims and objectives of the study. Wherever possible existing literature about learning and education in later life was used to

foster increased understanding of emergent themes and ideas. The following points constitute the main debates:

- The promise of *Life Through Learning Through Life* (2003) is not fulfilled as yet in terms of the expectations of participants, educational gerontologists or wider visions of proponents of the learning society. This requires analysis at all levels of sociological inquiry.
- This group of well informed, political and articulate participants defy popular discourse about the capacity of older people to contribute to the analysis of policy and the production of new knowledge. They felt excluded and rendered invisible by the policy, which claimed a lifelong perspective. This would seem to suggest that a structural analysis is required.
- Learning and educational narratives permitted an insight into turning points, patterns and enduring themes persisting to the present day concerning perceived abilities. Questions then emerge concerning what shifts or modifies constraining patterns such as negative scripts about learning and education?
- Participants talked about a qualitative difference in their mode of learning in later life and that they wished to learn in a group with time to reflect upon issues raised. This raises issues concerning provision.
- Learning was linked to a sense of self, identity and agency. Continued research is needed to explore the links between identity and agency to achieve insight into what facilitates or constrains individual and collective agency of older learners.
- Participants intuitively reacted to their stories as “work in progress” i.e. with no closure concerning their abilities or wish to learn. This suggests the need for research into conditions that facilitate or constrain learning and growth throughout later life and into advanced old age.
- Frustration about lack of targeted provision at a reasonable cost prompted participants to exercise their own agency and find low cost, stimulating alternatives to satisfy learning and educational needs. The danger inherent in this action is that no political need is recognised to offer provision.
- The findings contribute some answers to questions raised by other researchers in educational gerontology concerning the meaning of learning and education for older people and how that might be affected by existing policy.

Chapter 6: Conclusion to the study

Overview of the issues

This thesis began with a quote from Laslett (1989) who is often referred to as the father of third age education and was someone who had conceived a Bill of Rights for educational provision for older people. The words were deliberately chosen to set the tone of the work. My interpretation of his words was that the notion of being a “trustee for the future” acknowledged life experience, established a sense of perspective and was a distinctive contribution towards social capital. However, the language used has since become viewed as problematic and exclusionary. Perhaps this conveys more about increased sensitivity to social exclusion over the last sixteen years and the growing understanding in social science about the extent to which language can perpetuate social divisions than Laslett’s expressed intent. The irony is that despite contemporary discourse about social inclusion, older people in this study both collectively and individually felt an acute sense of marginalisation and exclusion from a policy, which was billed as a lifelong phenomenon. Older people are also noticeably absent from literature that claims to discuss visions of a “learning society”. So despite rhetoric about striving for an inclusive society, the perception of this group of older learners was that they were on the periphery.

Limited attention of policy makers to learning and education in later life may also be coloured by theories and prevailing discourse about ageing, which remain polarised and pathologising. In consideration of the quality and dimensions of life after full time employment, the nine people who participated in this study declared that there was more to life after fifty than a preoccupation with health, pensions and accommodation. The nature of educational provision available in the experience of the nine participants was patchy and expensive. It consisted of leisure interests and the popular provision of educational technology training. Opportunities offered by University of the Third Age were positively appraised, as were initiatives by local libraries. Purposes of learning for this group of older people with an average age of seventy-two years included self-development, enjoyment, mental stimulation, the opportunity to learn with others and fun. The distinguishing factor was that they did not seek learning or educational opportunities for instrumental gain in the form of career development or educational qualifications. However, older people are as diverse a group as any other

and indeed some may not share Laslett's vision about their contribution to society. Indeed, he has been criticised by Finsen (2005) as promulgating a romanticised view of older people. Also the literature reveals that some people in later life do want to embark upon courses of study with specified awards (Jones 2000 and Hoult 2005).

In negotiating a route through those complex issues, I have drawn upon theoretical ideas from critical hermeneutics to help understand and interpret prevailing discourse and the way that personal narratives were situated against a socio-political background. This has meant trying to understand context, social mores and expectations concerning learning and education over the last eighty years. Analysis from this perspective revealed the extent to which older learners were consistently omitted from the lifelong learning agenda. People who are retired from paid work have little power to challenge poor resource allocation and as such, learning and educational needs are ignored. Dominant ideologies of lifelong education continue to be about economic gains, not citizenship issues. The nature of this analysis also helped to penetrate biographical accounts, which revealed dismissive attitudes to the learning and educational needs of women in the 1930s and 1940s. Equally, the extent to which participants put their aspirations "on hold" in order to ensure financial viability for themselves and their families was evident. Seven participants could recall important people who had acted as mentors or advocates for their intellectual development and progress. Turning points or learning epiphanies occurred when personal realisation of ability accompanied success. A reflective component of learning in later life was either commented on or demonstrated within the context of their narratives by all participants.

Selected moments of interpretation (Kincheloe and McLaren 2003) were chosen and revolved around exploring the impact of specific lifelong learning policy on the lives of participants and collective perceptions about the meaning of learning and education in later life. In particular, there were attempts to explore points of resonance between personal and political perspectives. Biographical accounts also produced insights about the extent to which learning and educational opportunities were shaping factors in the continuing evolution of a coherent sense of a learning self. Identities were continually being shaped by experience and one of the interesting issues was that participants felt a

renaissance of their learning capacity in later life. "I feel that I have learned more since I retired," exclaimed Participant 9 in one focus group and the nature of learning was about changing thinking and becoming more critical. The wish to act on perceived injustice was present and evidenced by the wish to lobby politicians and advocate for other older people.

No final truth is sought through this exposition. But I sustain a strong belief that the social construction of the learning and educational needs of older people as unimportant needs to be challenged. In the exploration of that belief, an interpretative methodology was devised through this multi-method, and multi-layered study to raise both my own and the groups' consciousness about prevailing themes of exclusion on the basis of age from learning and educational opportunity. A life course approach to learning, which was envisaged as desirable by educational gerontologists and seemed to be intrinsic within the idea of lifelong learning and the learning society, has not been operationalised in practice.

To help with interpretation of those issues, I have explored a possible rapprochement between key ideas within lifelong learning, educational gerontology and most importantly the narratives of a group of older people about the meaning of learning and education in later life. Critical educational gerontology has the best conceptual fit with critical hermeneutics in that in the process of joint exploration new ways of acting can emerge. This nevertheless relies upon the creation of a "culture of empowerment" as outlined by Walker (1998:31) to facilitate partnership working between service providers and older people. In no sense did this study set out to emancipate, but as part of a number of initiatives that this group of older people had been involved in, I think it has provided another forum for identifying and evaluating an area of disadvantage. Impetus for the idea of considering lifelong learning and educational gerontology in tandem was prompted by my perception that key writers in educational gerontology had sought alignment with lifelong learning as a way to foster the rights of older people to education. For example, over thirteen years ago, Withnall (1992:23) stated that "the educational gerontology of the future may need to be subsumed within the developing philosophy of adult education as a lifelong process".

Prevailing tensions

From my exploration of selected literature and collective perceptions within the focus groups it appears that the philosophy of lifelong learning and policy remains a contested area. Investigations around this area quickly led into the complexities of understanding lifelong learning as embedded within the notion of the learning society. Both are problematic concepts. Many writers, including Cole (2000), have considered that neither has become a reality. Economic preoccupation continues to be the prevailing discourse in contemporary lifelong learning policy, with the issues of active citizenship and the contribution of learning to individual and social capital a parallel but undeveloped discourse. It is the latter aspect of lifelong learning that is most important to people who are retired from full-time employment. From experiences of involvement in running courses to enable older people to fully contribute to partnership working in policy, research and practice, Dewar (2003) contends that understanding of those complex concepts does not happen automatically. There is a place for provision of learning experiences that help people critically appraise issues of citizenship, genuine partnership and social exclusion. Few opportunities exist in Scotland for this type of learning and educational experience.

In relation to policy inception, development and implementation Griffin (2001) argues that there is conceptual confusion concerning lifelong learning. His view is that policy will inevitably be found wanting because it needs to be informed by a competent understanding of the inherent issues. One of those issues, inherent in his argument, is that there is “abandonment of education as social policy in favour of individual learning as a government strategy” (Griffin 2001:124). Despite the fervour of 1998 concerning the value of education, the Labour government seems ambivalent about funding education for all under the social democratic auspices of the welfare state. Learning then becomes an individual responsibility, and as such it would be contrary to that underpinning value system and erroneous to devise a policy to institute such provision. This is a divisive situation, which leads to problems with distributive justice. Those who are knowledgeable, powerful and vocal would be able to lobby for learning and educational resources; those who do not possess this energy or acumen will not be heard or catered for.

Nevertheless, it is important to acknowledge the gains and progress that have been made. In Scotland, since the end of the 1990s lifelong learning has been linked with the notion of the learning society and it is described in policy as pivotal for improving economic competitiveness and social cohesion through publications such as Scottish Office (1998) and Scottish Executive (2001). While those two concepts may seem contradictory, the link between lifelong learning and the interpretation of social cohesion as wider participation resulted in local authorities developing three-year Community Learning Plans which did begin to acknowledge the learning needs of older people. Those plans directly addressed the social purposes of education and the key principles of active citizenship, inclusion, consultation and the chance to learn throughout life. Interestingly, ageism was detected as a problem in a number of plans within local authorities in Central Scotland. Also, it must be acknowledged that the widening participation agenda operationalised by the Metropolitan Access and Articulation to Community-based Higher Education (MAATCHED) scheme provided the impetus and funding for the original Education for Participation course run by Queen Margaret University College. While not condoning the omission of older people from the policy agenda, in keeping with the historical and contextual analysis attempted throughout the thesis, there is a detectable lineage of provision in Scotland. However, progress in the area is slow, it is small scale, it does not address demographics or offer a range of provision.

This chapter concludes my thesis by suggesting that a life course approach to lifelong learning is overdue but remains the preferred option if learning is truly conceptualised as a right for everyone. The current situation concerning lifelong learning is problematic especially in relation to the formation of policy, and as Griffin (2001) has emphatically stated, the policy exists. However, work can now be directed towards reform and development of lifelong learning policy in relation to older people. This was the collective conclusion within the focus groups in this study and a plan of campaign was already being formed in the minds of the participants in this group to continue to lobby local and national politicians and in particular to make a case to the new commissioner for older people. Participants wished to propose that in any reform of *Life Through Learning Through Life* (2003) a section on the learning needs of later life should be included.

The enduring tension between education and learning continues to haunt much contemporary writing about lifelong learning, but within this there remains a legitimate query over the salience of educational gerontology as a discipline if lifelong learning policy downgrades issues of educational provision generally. It would appear from recent research studies, notably Dench and Regan (1999) and Aldridge and Lavender (2000), that emphasis is shifting from the relationship between learning and education towards the relationship between learning, wellbeing and health. Reed et al (2003:71) found that while the notion of “active, healthy ageing” came from professional discourse, older people themselves preferred the term “comfortable healthy ageing”. If health were a potential outcome of learning pursuits then it would provide a persuasive answer to the question of what learning in later life is for. It would certainly raise government interest. Curiously, there was a dynamic both within the focus groups and within the narratives that the motivation for involvement in learning was to stave off the spectre of dependency by keeping minds active. So, this link with health and wellbeing is in the consciousness of older people as they embark on formal, informal or non-formal learning. From a critical hermeneutic analysis, this shift may occlude the key issues about legitimate provision of resources towards a quasi-therapeutic rationale, which Minkler (1996) argued may perpetuate the disempowerment of older people who could not rise to the challenge of learning to stay well.

One point at which there seems to be some synthesis of views from lifelong learning and educational gerontology is about the shift towards a more values-based and reflexive approach within learning and educational provision. This focus on critical thinking resonates both with the critical educational gerontology literature and certain theorists in lifelong learning. A reflexive self-questioning approach to lifelong learning provision seeks to challenge institutional ageism whereby older people are rendered invisible in policy and in practice. It would also consider a broader range of learning choices linked to learning preferences. I have argued in the previous chapter that the group of people with whom I worked demonstrated a reflexive approach within their individual learning stories and indeed collectively within focus groups. They could consider, articulate and operationalise their own learning aspirations and they had actively sought opportunities to continue to intellectually grow and change. This was despite structural constraints and omissions in policy that could have guaranteed provision. Over the year, this quality of involvement acted as a means to connect

feeling, thinking and action in their own lives. Indeed, there was a strong theme in the narratives that later life was a time of intellectual change and gain where thinking had qualitatively changed. This was encapsulated by the notion often articulated by participants of “doing less and thinking more”.

The issue then becomes what conditions need to exist for older people to gain more purchase on policy development and access a range and variety of learning opportunities. I set out to locate older people within literature about the learning society. Writers such as Ranson (1998), Field and Leicester (2000) and Field (2002) who had been instrumental in articulating those ideas were accessed plus review of lifelong learning policy such as *Life Through Learning Through Life* (2003). Despite beguiling titles of policies or texts that promise an inclusive approach and attention to needs over the life course, verification of attention to later life within searches of selected literature and study of the policy by the group and me proved to be disappointing. A partial discourse could be detected in some literature and policy concerning people who were retired from full time work and about the value added aspects of lifelong learning policy. But, Young and Schuller’s (1991) hope for an inclusive ageless society and one in which they conceived older people as potential “revolutionaries” remains ahead of its time in this respect.

Policies, practices, research and theories that continue to omit, marginalise or portray such a large proportion of people in a pessimistic light is tantamount to ageism, as Bytheway (1995) forcefully stated. He revealed the extent to which we stratify society, policies, research, theories and practices in ways that exclude and perpetuate a “them and us” phenomenon. The immediate reality of this powerful dynamic occurred within this study when the notion of the group being unrepresentative was mooted. This prompted a frustrated and sustained reaction in the group, which seemed related to their collective identity. However, it must be remembered that it was first mooted by one of the participants in the first focus group who was attempting to differentiate the nature of their participation in learning activities from some other older people who choose not to be so politically active. Ideas of unrepresentativeness preoccupied the group and it became a recurrent theme for discussion in the subsequent two groups. While their resistance to the allegation of unrepresentativeness does not disprove it, the reasons for their uncomfortable reaction is something

that required analysis. Participants had clearly thought about it between groups and wanted to collectively resurrect it as an issue. It was perceived as a slight and a criticism, almost as if they were being portrayed as powerful, elite and different from other older people.

The meaning of learning for the people in this study

As the Postscript reveals, the meanings associated with the work for this thesis included the importance of social interaction and the social relationships formed over the course of the year. They construed their time in the study as a learning event as well as helping with a piece of systematic inquiry. This also resonates with the principles of critical hermeneutics whereby the process of inquiry doubles as means to take action (Thompson 1990). It was also invested with collective meaning and named and framed by one of the participants. The group learning story was titled “Lifelong learning – work in progress”. This conveyed growth and acknowledged both the individual learning pursuits of participants and the collective experience. Investment of meaning was also shown in the ways that each participant construed and attributed titles for their own learning story. The titles became metaphors for their conceptions of learning and their identities as learners. Notwithstanding the fact that formal learning seems to be an important feature of each participant’s lives and they seek out and maximise opportunities, they also reflect upon the importance of “life’s learning” and their own adaptive responses. The stress on situated learning, learning from adverse life events and informal self-directed learning asserted their self-awareness of experiential learning and that important learning did not have to occur in formal settings. This focus upon life experience is part of the discourse that older people capitalise upon a wealth of life events, which in many cases may compensate for lack of opportunities for formal schooling. Meanings of learning seemed intimately connected to senses of self and evolving identity.

What I have learned from this experience

This experience has helped me to contextualise the issue of learning and education in later life within the rubric of policy, theory, research and practice and appreciate social forces that impact upon older people. Without question, the work involved in the thesis has developed my skills in systematic inquiry and in particular the challenges of working dialogically with a group of participants who had a

real investment in the process. I have been able to locate myself not only as a researcher but also as a joint explorer who shared developing ideas with the group and in doing so shaped subsequent phases of the study. I have learned about the complexities of the power relationship whereby I have set the parameters for the study but the group have the opportunity to reject, shift or alter the emphasis. This specifically occurred in the last group, whereby my questions relating to the learning society and the purpose of learning and education in later life were no longer salient within the group. Instead, they wanted to address other issues such as gender difference in learning. In this respect the reflexive journey in the thesis has allowed me to critically explore my own assumptions, positioning and behaviour within the focus groups and narrative interviews. In particular, I have become more aware of how knowledge was (co-) constructed between the nine participants and me within interviews and subsequent analysis (Mishler 1986).

Directions for future work

- This study corresponds to the vision and values of the ESRC Growing Older Programme, the Joseph Rowntree Foundation's Older People's Programme and a growing number of researchers who have been involved in collaborative study of issues in later life with older people (Glanz and Neikrug 1997, Leamy and Clough 2001, Chambers and Pickard 2001 and Finsen and Carvahlo 2004). It also appears, according to comment of one of the researchers (Ford 2005), to be a microcosm of a large multi-site longitudinal study called Learning Lives: Learning, Identity and Agency led by Biesta (2004). This work involves all adult learners and does not specifically focus on older learners. However, the research focuses upon the meaning of learning and the significance of life course transitions for learning, identity and agency. More specifically, my study coincides with the mission of the RBS Centre for the Older Person's Agenda at Queen Margaret University College. According to the values of this Centre, to realise the vision of partnership working in an inclusive society, all parties need the tools to negotiate and participate in authentic collaboration. Thus, the aims and questions that this study evolved from are in line with those of a growing number of like-minded researchers and it is in line with the wider intentions of European Research Priorities in the Field of Ageing (Walker and Cook 2004).

- As the Joseph Rowntree Foundation's Older People's Programme has shown, older people can shape policy and practice. They can also commission research about older people and the time seems opportune for such a possibility which might study the impact of contemporary lifelong learning policy on the learning and educational lives of older people in Scotland. As a precursor to that possibility however, there needs to be more in-service work with professionals and researchers about working in partnership with older people. Although there are attempts to include older people within forums and committees associated with the activities of *Better Government For Older People*, this can be perceived as tokenistic. There are "no standards about the numbers of older people involved, the stage at which they are included, their scope to influence outcomes and resources to support their involvement". (Joseph Rowntree Foundation's Older People's Programme 2004:6). It would appear that further systematic inquiry concerning collaborative working with older people including its strengths and difficulties is required.
- The relationship between educational opportunities, learning, health and wellbeing in later life needs to be critically explored particularly as it served as a clear motivating factor for this group of participants to learn in informal, formal and non-formal situations. Existing work by Dench and Regan (2000) suggested a direct benefit from learning in terms of general wellbeing and Aldridge and Lavender (2000) endorsed those findings although, their population comprised all active adult learners. One of the most important findings from their study was the positive impact upon emotional and mental wellbeing.
- The extent to which learning and educational attainment had shaped identity and acted either as a prompt or a constraint towards learning in later life is another area worthy of further study. The themes emerging from the narrative interviews coalesced around learning contributing to a sense of self where participants depicted themselves as "a lifelong learner", "a practical learner", "a reflective learner", "a flawed learner" or qualitatively different learners when they reached later life. While explanations about intrinsic themes or scripts that provide coherence for a sense of self or identity are plausible, more specific understanding about what transforms pre-existing

perceptions about learning capacity would be valuable for andragogy or more specifically gerogogy.

- Exploration of factors that facilitate or constrain individual or collective agency in later life is also necessary to accompany any treatise on partnership working. While a consensus exists from the pre-existing work referred to in this study that learning and education opportunities promote confidence in older learners, an understanding of the type and nature of opportunities that are most helpful would be a particular advantage. In addition, the needs of someone aged sixty and newly retired are different from someone who is eighty-five and more exploration of the diversity of provision is required.

Learning and education in later life encompasses a diverse range of issues. As findings from the focus groups and narratives reveal, perceptions of the participants were influenced by historical, psychological, social and cultural factors. As they cast their attention retrospectively and prospectively, a picture was created of what learning and education meant to them. It was a vibrant construct for this group of people and intrinsically linked with their senses of self and identity. Perceptions of the nature of learning and education were influenced by policy and theory, which in their view did not fully represent their interests and purposes. The purpose of learning and education for this group included self-fulfilment, intellectual development, fun and social reasons but the link with health and wellbeing was strong. Educational gerontology shares the values of lifelong learning but has not as yet had purchase upon policy design or development. Securing specific resources for older people remains a quest for advocates. Social change takes time as the evolution of the ideas of lifelong learning attests to, but a change in the perception of and attitudes towards older people in this arena needs major revision in theory, practice and research. Learning and education remained valuable and meaningful components in the lives of those nine participants as expressed through the words of one lifelong learner:

Participant 1: L's 482-3 "I mean.....I don't know..... I mean.... I just couldn't imagine not wanting to learn, not wanting to find out".

Letter accompanying the Postscript

Dear Sheena

Postscript

I am enclosing the postscript which I have edited from the various and varied submissions from the members of the group. I have been quite brutal in editing these. I have, perhaps subjectively, excluded much that had little relevance to the project and have been conscious of the varying amounts of text that the submissions contained. In other words, I have tried to produce some sort of balance among the members and have plumped for anonymity.

Also I have, as you can see, organised the text into a number of key topics. To some extent, these were present in the originals and it gave me the excuse I was looking for to eliminate what I (again subjectively) considered less relevant. Everyone has wound up quoted; some more than others. and I, for instance, had the advantage of knowing what topics to address.

I can, of course, let you have the originals so that you will be able to judge how fair I have been or otherwise and that would allow you to identify the sources. Let me know if you want me to do that. In any case, I'm quite prepared to take whatever stick the postscript attracts.

Yours sincerely

POSTSCRIPT

By the members of the focus group on *Perspectives on Learning and Education in Later Life*

The Source

The source of the Group was a series of modules under the generic term *Education for Participation* run by QMUC Centre for the Older Person's Agenda. There is no doubt that the experience of these modules coloured the group's views on *Perspectives*. About the modules it was said:

- (They).... taught me the value of many things, including...getting to know myself better.
- I.....appear to be beset by.... people who talk only about people; others talk about things and at great length. (The modules) brought me into a third category of those who talk about ideas.
- My anxieties (at meeting the members for the first time) very quickly disappeared when I realised I knew most of the members..... We had attended a course at QMUC....
- This..... gave a taste of what education for older people could be and had a bearing on my attitude to lifelong learning.
- I found the modules.....interesting, enjoyable and, most importantly, fun.
- The tutors were never patronising and found many ways to increase my confidence.

The Group

All of the members left school before completing their secondary education and many had experience of formal education subsequently. It has been said that we were not representative and while this might be the case with regard to the older population as a whole, we are representative of a great many older people to whom the topic has relevance.

- I did not know of *Perceptions on Learning and Education in Later Life* but I was anxious to become involved.
- The old grey matter stirred.....
- I have enjoyed meeting this group of people and learning more about educational opportunities in Scotland.
- I enjoyed meeting so many interesting and diverse people – everyone had something to offer.

The Document – *Life Through Learning Through Life*

Comments on the document included:

- I downloaded the whole document from the web..... (it) was about training and getting people into employment.
- The document failed to address.....pre-school children and, as for learning through life, older people fell off their perch at 64.....
-lifelong learning is defined in terms of personal fulfilment, active citizenship, social inclusion, enterprise and employability and adaptability.....it is aimed at providing a flexible workforce for the Scottish economy.....it appears to define lifelong learning in terms of being an economic unit....
- I felt rejection when I read and re-read this policy.
- Having the full document I was disappointed but not surprised at the failure to mentioneducation or training for people beyond their economic life.
-failure stems from Enterprise, Transport and Lifelong Learning in the name and, presumably, the scope of the ministry from which it emanated.
-when you reach a certain age,.....learning is not availablebecause you (are).....unable to contribute to the economy.
- Have they considered the benefits to older people.....keeping their minds and bodies active (and).....cut(ting) NHS costs.

The Process – Focus Group

- The first meeting was..... briefed by Sheena about her project and the part (we) would play..... Would I be able to cope.
-what could this subject.....be able to encompass?.....what would be (the) age groups covered?.....what actions proposed would be actioned.....
- It has been interesting to hear how others have tackled retirement..... how we have learnt through life.
-we have all enjoyed the learning we have done at this stage of life and hope to continue to do so.....
- Initially, I struggled with the focus group.....However, Sheena ensured that all members contributed to the topics.....
- The meetings were always relaxed, good humoured and above all informative.
- The interchanges were stimulating and the universal condemnation of the policy embodied in the document should be communicated to the department it came from.
- ...was well thought out and encouraged us to give our opinions.....

The Process – The Interview

- The one-to-one interview was very revealing. The transcriptwas very different to what I thought I had said.....a learning experience!
- My initial reticence.....faded into insignificance when the date for recounting my story was set.
-I decided that the only way I could copewas to see it as someone else's.....
- Recounting my story allowed me time to stop and reflect on what lifelong learning has meant to me..... it has given me ownership of my personal history.
- The interview must have been skilfully conducted..... it certainly opened my floodgates.
-or perhaps.....people like to talk about their education – either their lack of opportunity or accomplishments.

- I had no problems with the interview.....it was interesting to realise how much we had in common.....

The Group's Views on the Experience

- I enjoyed the discipline of working on the project – of developing and broadening my thoughts.....
- (The experience) widened my knowledge of my peers..... and taught me to rebel against the popular cynicism
- I am privileged to (contribute to) this postscript and grateful for the new ideas given me and trust that (they) have legs.
- Being asked to be part of the focus group hasbeen very valuable.... (to) me. I would like to express my best wishes to Sheena..... Her impeccable organisation and kind hospitality is worthy of note.
-older people are a source of wisdom and experience that should not be overlooked..... Sheena..... has seen the importance of this and used her skills as a facilitator and interviewer to draw from us the distilled experience we jointly possess.
- I thoroughly enjoyed the experience; except for the drive home. Sheena deserves to reach her goal...she did all the work.

References

Aldridge, F. and Lavender, P. (2000) The Impact of Learning on Health. Leicester: National Institute of Adult Continuing Education.

Aldridge, F. and Tuckett, A. (2004) Business as Usual.....? The NIACE Survey of Adult Participation in Learning 2004. Leicester: National Institute of Adult and Continuing Education.

Andrews, M. (2002) Introduction: counter-narratives and the power to oppose. Narrative Inquiry. 12 (1): 1-6.

Aspin, D.N. and Chapman, J.D. (2000) Lifelong learning: concepts and conceptions. International Journal of Lifelong Education 19 (1): 2-19.

Atchley, R.C. (2000) Retirement as a social role. In Gubrium, J.F. and Holstein, J.A. (Eds) Ageing and Everyday Life.(115-124) Oxford: Blackwell Publishers Ltd.

Ball, S.J. (1990) Politics and Policy-Making in Education. London: Routledge.

Ball, S. (1991) Learning Pays: The Role of Post-Compulsory Education and Training. London: Royal Society of Arts.

Baltes, P.B. and Baltes, M.M. (1990) Successful Aging: Perspectives from the Behavioural Sciences. Cambridge: Cambridge University Press.

Baltes, M. and Carlestensen, L. (1996). The process of successful ageing. Ageing and Society, 16: 397-422.

Baltes, P.B. and Schaie K.W. (1977) Aging and IQ : The myth of the twilight years. In Zarit, S.H. (Eds) Readings in Aging and Death: Contemporary Perspectives.(67-71) New York: Harper & Row.

- Banister, P. Burman, E. Parker, I. Taylor, M. and Tindall C. (1994) Qualitative Methods in Psychology A Research Guide. Open University Press: Buckingham.
- Barbour, R.S. and Schostak, J. (2005) Interviewing and focus groups. In: Somekh, B. and Lewin, C. (Eds) Research Methods in the Social Sciences (41-48) London: Sage Publications.
- Baron, R.S. and Kerr, N.L. (2003) Group Process, Group Decision, Group Action. Buckingham: Open University Press.
- Battersby, D. (1987) From andragogy to gerogogy. Journal of Educational Gerontology, 2 (12): 4-10.
- Battersby, D. and Glendenning, F. (1992) Reconstructing education for older adults: an elaboration on first principles, Australian Journal of Adult and Community Education 32: 115-121.
- Battersby, D. (1993) Developing an epistemology of professional practice within educational gerontology. Journal of Educational Gerontology, 8 (1): 17 – 25.
- Bernard, M. (2001) Woman ageing: old lives, new challenges. Education and Ageing, 16 (3): 333-352.
- Biesta, G. (2004) Learning and living. Adults Learning, Sept: 18-19.
- Blaikie, A. (1999) Ageing and Popular Culture. Cambridge: Cambridge University Press.
- Blythe, R. (1979) The View in Winter: Reflections on Old Age. London: Allen Lane.
- Bond, J. Briggs, R. and Coleman, P. (1993) The study of ageing, In Bond, J. Coleman, P and Peace, S. (Eds) Ageing in Society. (19-52) London: Sage Publications.

- Brown, D. and Pedder, J. (1979) Introduction to Psychotherapy: an outline of psychodynamic principles and practice. London: Tavistock Press.
- Brown, M. (2004) Personal Communication.
- Bruner, J. (1996) The Culture of Education. Cambridge: Harvard University Press.
- Bryman, A. (2004) Social Research Methods. Oxford University Press: Oxford.
- Bryne-Armstrong, H. (2001) Re-authoring self: knowing as being. In Bryne-Armstrong, H. Higgs, J. and Horsfall, D. (Eds) Critical Moments in Qualitative Research.(68-78) Oxford: Butterworth Heinemann.
- Bytheway, B. (1995) Ageism. Buckingham: Open University Press.
- Cairns, T.M. (2003) Citizenship and re-generation: participation or incorporation. In Coare, P. and Johnstone, R. (Eds) Adult Learning, Citizenship and Community Voices.(108-123) Leicester: National Institute of Adult Continuing Education.
- Carlton, S. and Soulsby, J. (1999) Learning to grow Older and Bolder. Leicester: National Institute of Adult Continuing Education.
- Challis, C. (1996) Adult education on prescription. Adults Learning, 8 (3): 66-67.
- Chambers,P.and Pickard, J. (2001) Involving older members of the lifetime project in research :a report of research in progress. Education and Ageing, 16 (1): 27-37.

- Chase, S.E. (1996) Personal vulnerability and interpretive authority in narrative research. In Josselson, R. (Ed) Ethics and Process in The Narrative Study of Lives.(45-59) Thousand Oaks: Sage Publications.
- Cheek, J.and Gough, N. (2005) Postmodern perspectives. In Somekh, B. and Lewin, C. Research Methods in the Social Sciences.(302-309) London: Sage Publications.
- Cloonan, M. and Crossan, B. (2002) Lifelong learning: exploring the issues in an area of social deprivation in Scotland. Scottish Educational Review, 34 (1): 76 – 85.
- Clouston, T. (2003) Narrative methods: talk, listening and representation. British Journal of Occupational Therapy, 66 (4): 136 – 142.
- Coare, P. and Johnston, R.(Eds) (2003) Adult Learning, Citizenship and Community voices. Leicester: National Institute of Adult Continuing Education.
- Codd, J.A. (1988) The construction and deconstruction of educational policy documents. Journal of Educational Policy, 3 (3): 243-247.
- Coffey, A. and Atkinson, P. (1996) Making Sense of Qualitative Data: Complementary Research Strategies.Thousand Oaks: Sage Publications.
- Coffield, F. (1999) The concept of the learning society explored. Journal of Education Policy, 12 (6): 449-558.
- Cohen, A.P. (1994) Self Consciousness: An Alternative Anthropology of Identity. London: Routledge.

- Cohler, B.J. (1993) Aging, morale, and meaning: the nexus of narrative. In Cole T.R. Achenbaum, W.A. Jakobi, P.L. Kastenbaum R. (Eds) Voices and Visions of Aging: Towards a Critical Gerontology. (107-133) Springer Publications Company: New York.
- Cole, M. (2000) The issue of age in the learning age: a critical review of lifelong learning in the United Kingdom under New Labour. Education and Ageing, 15 (3): 437 – 453.
- Connelly, M..F.and Clandinin, J.D. (1995) Narrative and education. Teachers and Teaching: Theory and Practice, 1 (1): 73-85.
- Cortazzi, M. (1993) Narrative Analysis. London: Falmer.
- Courtenay, B.C. and Truluck, J. (1997) The meaning of life and older learners: addressing the fundamental issue through critical thinking and teaching. Educational Gerontologist, 23 (2): 175 – 195.
- Crawford, R. Brown, B. and Crawford, P. (2004) Storytelling in Therapy. Cheltenham: Nelson Thornes Ltd.
- Cronin, A. (2003) Focus groups. In Gilbert, N. (Ed) Researching Social Life.(164-177) London: Sage Publications.
- Cusack, S. (1999) Critical educational gerontology and the imperative to empower. Education and Ageing, 14 (1): 21 – 37.
- Czarniawska, B. (2004) Narratives in Social Science Research. London: Sage Publications.

- Dahlgren, P. (1988) What's the meaning of this? Viewer's plural sense making of TV news. Media, Culture and Society, 10 285-301.
- Daniels, R. (1996) Justice and Justification: Reflective Equilibrium in Theory and Practice. Cambridge: Cambridge University Press.
- Davey, J.A.(2002) Active ageing and education in mid and later life. Ageing and Society, 22: 95 – 113.
- Day Sclater, S. (1998) Creating the self: stories as transitional phenomena. Auto/Biography, V1 (1&2): 85-92.
- Delors, J. (1996) Learning: The Treasure Within. Paris.:UNESCO.
- Dench, S. and Regan, J. (2000) Learning in Later Life: Motivation and Impact. (IES Report), The Institute for Employment Studies/DfEE, Brighton.
- Denzin, N.K. and Lincoln Y.S. (Eds) (2003) The Landscape of Qualitative Research: Theories and Issues. Thousand Oaks: Sage Publications
- Department of Health (2001) National Service Framework for Older People. London: Department of Health.
- DePoy, E. Gitlin, L. (1994) Introduction to Research. St Louis: Mosby.
- Dewar, B. and Alexander, M. (2002) Education for Participation. Unpublished Report. Edinburgh: Queen Margaret.University College.
- Dewar, B (2003) Speaking for ourselves. Nursing Older People, 15 (6): 10 – 16.

Dey, I. (1993) Qualitative Data Analysis: A User Friendly Guide for Social Scientists. Routledge: London.

Duggleby, W. (2005) What about focus group interaction data? Qualitative Health Research, 15 (6) :832-840.

Ebren, M. (1998) Biography and Education: a reader. Falmer Press: London

Edwards, R. Ranson, S. and Strain, M. (2002) Reflexivity: towards a theory of lifelong learning. International Journal of Lifelong Learning, 11 (4):525 – 536.

Edward, R. Miller, N. Small, N. and Tait, A (Eds) (2002) Supporting Lifelong Learning. Routledge Falmer: London.

Elliot, G. (2000) “Teach granny too”- images of ageing: towards a contemporary theory of lifespan learning. Paper presented at the British Educational Research Association Conference, Cardiff University Sept 7-10.

Elmore, R. (1999) Education for older people: the moral dimension. Education and Ageing, 14 (1):9 – 20.

Erikson, E. (1963) Childhood and Society. New York: W.W. Norton.

ESRC (2001) Growing Older: Research and Policy. Papers from Launch Conference. Sheffield: Economic and Social Research Council.

ESRC (2004) Mapping the Public Policy Landscape. The Demographic Trends in Scotland: a Shrinking and Ageing Population. London: Economic and Social Research Council.

European Economic and Social Committee (2004) Proposal for a decision of the European Parliament and of the Council establishing an integrated action programme in the field of lifelong learning: Brussels.

Ezzy, D. (2002) Qualitative Analysis: Practices and Innovation. London: Routledge.

Faure, E. Herrera, F. Kaddowa, A. Lopes, H. Petrovsky, A. Rahnema, M. and Ward, F. (1972) Learning to Be: The World of Education Today and Tomorrow. Paris: UNESCO/Harrap.

Field, J. Leicester, M. (Eds) (2000) Lifelong Learning: Education across the Lifespan. London: Routledge Falmer.

Field, J. (2002) Lifelong Learning and the New Educational Order. Stoke on Trent: Trentham Books.

Findsen, B. and Carvalho, L. (2004) Working alongside older adults in a qualitative participatory research project: issues and challenges. Journal of Adult and Continuing Education, 10 (2): 175- 183.

Findsen, B. (2005) Learning Later. Malabar, Florida: Krieger Publishing Company.

Finlay, L. (2000) Multiple voices, multiple paths: choosing between qualitative traditions. British Journal of Occupational Therapy, 63 (12): 580-582.

Finlay L. (2001) Negotiating the swamp: the opportunity and challenge of reflexivity in research practice. Qualitative Research, 2 (2): 209-230.

Finlay, L. (2002). "Outing the researcher: the provenance, process and practice of reflexivity. Qualitative Health Research, 12 (4) 531–545.

Finlay, L. Gough, B. (Eds) (2003) Reflexivity: A Practical Guide for Researchers in Health and Social Sciences, Blackwell Publishing: Oxford.

Ford, G. (2005) Personal Communication. TALIS Conference, Strathclyde University. Glasgow.

Formosa, M. (2002) Critical gerogogy: developing practical possibilities for critical educational gerontology. Education and Ageing, 17 (1): 73 – 85.

Freire, P. (1972) Pedagogy of the Oppressed. Tr Myra Bergan Ramos. Harmondsworth: Penguin.

Fryer, R.H. (1998) Learning for the Twenty-first Century: First Report for National Advisory Group for Continuing Education and Lifelong Learning. Department of Education and Employment: Sheffield.

Glanz, D. and Neikrug, S. (1997) Seniors as researchers in the study of aging: learning and doing. The Gerontologist, 37(6): 823-827.

Glendenning, F. and Jones, S. (1976) Education and the Over-60's. Stoke-on-Trent: Beth Johnson Foundation in Association with the Department of Adult Education: University of Keele.

Glendenning F. (1985) Educational Gerontology: International Perspectives. Croom Helm: London.

Glendenning, F. and Battersby, D. (1990) Why we need Educational Gerontology and Education for Older Adults. In Glendenning, F. and Percy, K. (Eds) Ageing, Education and Society.(219-231) University of Keele: Association for Educational Gerontology.

Glendenning F. (1997) Why educational gerontology is not yet established as a field of study. Education and Ageing, 12: 82 – 91.

Glendenning, F. (Ed) (2000) Teaching and Learning in Later Life: Theoretical Implications. Aldershot: Ashgate.

Glendenning F. (2001) Education for older adults. International Journal of Lifelong Education, 20 (1/2) 63 – 70.

Giddens, A. (1984) The Constitution of Society. Cambridge: Polity Press.

Giddens, A. (1991) Modernity and Self Identity. Oxford: Policy Press.

Gilgun, J.F. (2005) “Grab” and good science: writing up the results of qualitative research. Qualitative Health Research, 15 (2): 252-262.

Griffin, C. (2001) Lifelong learning and welfare reform In Edwards, R. Miller, N. Small and Tait, A. (Eds) Supporting Lifelong Learning: Making Policy Work (122-149). London: Routledge Falmer,

Gough, B. (2003) Deconstructing reflexivity In Finlay, L.and Gough, B. Reflexivity: A Practical Guide for Researchers in Health and Social Sciences.(21-35) Oxford: Blackwell Publishing.

Gubrium J.F. Holstein J.A. (Eds) (2000) Aging and Everyday Life. Blackwell Publishers Ltd, Oxford.

Gubrium, J. Holstein, J. (Eds) (2003) Postmodern Interviewing. Thousand Oaks: Sage Publications.

Hague, P. (1993) Interviewing. London: Kogan Page.

Hammell, K.W. Carpenter, C. Dyck, I.(Eds) (2000) Using Qualitative Research. A Practical Introduction for Occupational Therapists and Physical Therapists. Edinburgh: Churchill Livingstone.

- Hart, L.A. (2005) How many S's in success? Presentation at TALIS Conference, Strathclyde University.
- Hart, E. and Bond, M. (1995) Action Research for Health and Social Care. Buckingham: Open University Press.
- Hernadi, P. (1987) Literary interpretation and the rhetoric of the human sciences. In Nelson, J.S. The Rhetoric of the Human Sciences.(263-275) Madison: University of Wisconsin Press.
- Higgs,P. (1995) Citizenship and old age. Ageing and Society, 15 (4): 535-550.
- Hockey, J. James, A. (2003) Social Identities Across The Life Course. Basingstoke: Palgrave MacMillan.
- Holliday, A. (2002) Doing and Writing Qualitative Research. Thousand Oaks: Sage Publications.
- Hollway, W. and Jefferson, T. (2000) Doing Qualitative Research Differently. London: Sage Publications.
- Holloway, I. (1997) Basic Concepts for Qualitative Research. Oxford: Blackwell Science.
- Holt, J. (1971) Instead of Education. Harmondsworth: Penguin.
- Hoult, E. (2005) Senior Learner's Experiences of Higher Education: Findings to date. Presentation at TALIS Conference, Glasgow 11/5/05.
- Houghton, A-M. (2003) The many voices of the invisible citizen: disabled people speaking out. In Coare P. Johnston R. (Eds)Adult Learning, Citizenship and Community Voices.(124-138) Leicester: National Institute of Adult Continuing Education.

Hughes, C. Tight, M. (1998) The myth of the learning society In Ranson S. (Ed) Inside the Learning Society.(179-188) London: Cassell.

Husserl, E. (1970) The Crisis of European Sciences and Transcendental Phenomenology. (D.Carr Trans) Evanston I.L: Northwestern University Press.

Hutchins, R. (1968) The Learning Society. Harmondsworth: Penguin.

Husen, T. (1974) The Learning Society: London: Methuen.

Illich, I. (1971) Deschooling Society. London: Calder and Boyars.

Illich, I. (1973) After Deschooling, What? London: Writers and Readers Co-operative.

Jarvis, P. (2001) Learning in Later Life: an introduction for educators and carers. London: Kogan Page.

Jarvis, P. Holford, J. Griffin, C. (Eds) (2003) The Theory and Practice of Learning. London: Kogan Page.

Jarvis P. (2004) Lifelong learning and active citizenship in a global society: an analysis of European Union Lifelong Learning Policy. Journal of Adult and Continuing Education, 10 (1): 3-17.

Johns, C. (2000) Becoming a Reflective Practitioner. Oxford: Blackwell Science Ltd.

Johnston, R. (2003) Community education and lifelong learning: local spice for global fare? In Field, J.and Leicester, M. (Eds) Lifelong Learning Education across the Lifespan.(12-28) London: Routledge Falmer.

Jones, S. (2000) Older people in higher education: a personal perspective. Education and Ageing, 15 (3): 339 – 351.

Josselson, R. Leiblich, A. (Eds) (1999) Making Meaning of Narratives in The Narrative Study of Lives. Sage Publications: London.

Kaufman, S.R. (2000) The ageless self. In Gubrium ,J..F..Holstein, J.A. (Eds) Aging and Everyday Life. (103-111) Oxford: Blackwell Publishers Ltd.

Kehily, M.J. (1995) Self-narration, autobiography and identity construction. Gender and Education, 7(1): 23-31.

Kennedy, H. (1997) Learning Works: Widening Participation in Further Education. Further Education Funding Council: Coventry.

Khaw, K-T (1997) Healthy ageing. British Medical Journal, 315 :1090-1096.

Kincheloe, J.E. McLaren, P. (2003) Rethinking critical theory and qualitative research. In Denzin, N.K. & Lincoln, Y.S. (Eds)The Landscape of Qualitative Research Theories and Issues.(433-488) Sage Publications: Thousand Oaks.

Kitzinger, J. (1994) The methodology of focus groups: the importance of interaction between research participants. Sociology of Health and Illness, 16 (1): 103-121.

Knowles, M. S. (1980) The Modern Practice of Adult Education. New York: Adult Education Company.

Labov, W. and Waletzky (1967) Narrative analysis: oral versions of personal experience. Journal of Narrative and Life History, 70 (1-4): 3-38.

Labov, W. (Ed) (1977) The Transformation of Experience in Narrative Syntax: Language in the Inner City. Philadelphia: Blackwell.

Lamb, R. and Brady, E.M. (2005) Participation in lifelong learning institutes: what turns members on? Educational Gerontology, 31 (3): 207-224.

Lather, P. (1986) Research as praxis. Harvard Educational Review, 56 (3): 257 –277.

Laslett, P. (1989) A Fresh Map of Life. London: Weidenfield and Nicholson.

Leach, H. (2004) Crossing the line: stories on mapping the maze. The Times Higher, 18 –19.

Leamy, M. and Clough, R. (2001) Older people as researchers: their role in a research project. Education and Ageing, 16 (3): 279-287.

Levy, B.R. (2001) Eradication of ageism requires addressing the enemy within. The Gerontologist, 41 (5): 578 – 579.

Linde, C. (1993) Life Stories. The Creation of Coherence. Oxford: Oxford University Press.

Lopez, K.A. Willis, D.G.(2004) Descriptive versus interpretive phenomenology: their contributions to nursing knowledge. Qualitative Health Research, 14 (5): 726 –735.

Lucas, J. (1997) Making sense of interviews: the narrative dimension. Social Sciences in Health, 3 (2) :113 –126.

- Mallinson, T. Kielhofner, G. and Mattingly, C. (1996) Metaphor and meaning in a clinical interview. American Journal of Occupational Therapy, 50 (5): 338-346.
- Mantzoukas, S. (2004) Issues of representation within qualitative inquiry. Qualitative Health Research, 14 (7): 994 – 1007.
- Marshall, T. (1950) Citizenship and Social Class. Cambridge: Cambridge University Press.
- Mason J. (2002) Qualitative Researching. Sage Publications: London.
- Merriam, S.B. and Caffarella, R.B. (1999) Learning in Adulthood. San Francisco: Jossey-Bass.
- Mezirow, J. (1991) Transformative Dimensions of Adult Learning. Jossey-Bass: San Francisco.
- Midwinter, E. (1982) Age Is Opportunity: Education and Older People. London: Centre for Policy on Ageing.
- Midwinter, E. (1984) (Ed) Mutual Aid Universities. London: Croom Helm.
- Midwinter, E. (1993) Face-to-face provision and the older learner. In Calder, J. (Ed) Disaffection and Diversity: Overcoming Barriers for Adult Learners. (84-90) London: Falmer Press.
- Minkler, M. (1996) Critical perspectives on ageing: new challenges for gerontology. Ageing and Society, 16 (4): 467-487.
- Mishler, E. G. (1986) Research Interviewing: Context and Narrative. Cambridge: Harvard University Press.

- Mishler, E.G. (1995) Models of narrative analysis: a typology. Journal of Narrative and Life History, 5 (2): 87-123.
- Moodie, G. (2003) Scotland's high road to lifelong learning: a foreigner's observations. Journal of Adult and Continuing Education, 9 (1): 81 – 90.
- Moody, H.R. (1993) Overview: what is critical gerontology and why is it important? In Cole, T.R. Achenbaum, W.A. Jakobi, P.L. Kastenbaum, R (Eds). Voices and Visions of Aging: Towards a Critical Gerontology.(xv-xli) New York: Springer Publications Company.
- Morgan, D.L. (1988) Focus Groups as Qualitative Research Newbury Park: Sage Publications.
- National Institute of Adult Continuing Education. (2000) Briefing 2000 on Learning in Later Life. Leicester: National Institute of Adult Continuing Education.
- Osborne, M. Edward, R. (2003) Inquiring into lifelong learning. Journal of Adult and Continuing Education, 8 (2): 165 – 178.
- Ozga, J. (2000) Policy Research in Educational Settings: contested terrain. Buckingham: Open University Press.
- Pamphilon, B. (2005) How aged women remember their lifelong/lifeworld learning: making the best of life. Educational Gerontology, 31 (4): 283-297.
- Peacock, J.L. Holland, D.C. (1993) The narrated self: life stories in process. Ethos, 21 (4): 367- 383.
- Percy, K. (1990) Opinions, facts and hypothesis: older adults and participation in learning activities in the UK. In Glendenning, F. and Percy, K. Ageing, Education and Society: Readings in Educational Gerontology.(24-46) Keele: Association for Educational Gerontology.

- Peterson, D.A. (1976) Educational gerontology: the state of the art. Educational Gerontology, 1: 61 – 73.
- Phillipson, C. (1998) Reconstructing Old Age New Agendas in Social Theory and Practice. London: Sage Publications.
- Phillipson, C., Biggs, S. (1998) Modernity and identity: themes and perspectives in the study of older adults. Journal of Aging and Identity, 3 (1): 11-23
- Pinn, J. (2001) Crisis of representation. In Bryne-Armstrong, H., Higgs, J., Horsfall, D.(Eds) Critical Moments in Qualitative Research.(185-198) Oxford: Butterworth Heineman.
- Polkinghorne, D.E. (1988) Narrative Knowing and the Human Sciences Albany: State University Press.
- Polkinghorne, D.E. (1991) Narrative and self concept. Journal of Narrative and Life History, 1 (2/3): 135 – 153.
- Pyett, P.M. (2003) Validation of qualitative research in the “real world”. Qualitative Health Research, 13 (8): 1170-1179.
- Raggett, P.Edwards, R.and Small, N.(Eds) (1996) The Learning Society: Challenges and Trends. London: Routledge.
- Ranson, S. (1994) Towards the Learning Society. London: Cassell
- Ranson, S. (Ed) (1998) Inside the Learning Society. London: Cassell.

- Randall, W.L. (2002) Teaching story: the pedagogical potential of narrative gerontology. Education and Ageing, 17 (1): 55 –71.
- Rawls, J. (1972) A Theory of Justice. London. Oxford University Press.
- Reed, J. Payton, V.R (1998) Privileging the voices of older service users: a methodological challenge. Social Services in Health, 4 (4): 230 – 242.
- Reed, J. Cook, G. Childs, S. Hall, A. (2003) Getting old is not for cowards: comfortable, healthy ageing, York: Joseph Rowntree Foundation.
- Reissman, C.K. (1993) Narrative Analysis Thousand Oaks: Sage Publications.
- Ricoeur P. (1980) Narrative time. Critical Inquiry, 7 (1): 160 – 180.
- Ricoeur, P. (1981) Hermeneutics and the Human Sciences. Cambridge: Cambridge University Press.
- Rowe, J.W. Kahn, R.L (1997) Successful ageing. The Gerontologist, 37 (4): 433 – 440.
- Sarantokos, S. (2005) Social Research. Basingstoke: Palgrave MacMillan.
- Schaie, K.W. Labouvie-Kemp G.(1974) Generational versus ontogenetic components of change in adult cognitive behaviour: a fourteen year cross-sequential study. Developmental Psychology, 10: 305-20.
- Schön, D. (1983) The Reflective Practitioner. Avebury Press: Aldershot.
- Schön D. (1987) Educating the Reflective Practitioner. Jossey Bass: San Francisco.

Scottish Executive (2001) Better Government for Older People: All Our Futures In Scotland.

Edinburgh: Scottish Executive.

Scottish Executive (2003) Life Through Learning Through Life The Lifelong Learning Strategy for Scotland. Edinburgh: Scottish Executive.

Scottish Office (1998) Opportunity Scotland: A Paper on Lifelong Learning. Edinburgh: The Stationary Office.

Scottish Office (1998) Communities: Change Through Learning: A New Vision For Community Education. Edinburgh: The Stationary Office.

Schuller, T. (1997) Building social capital: steps towards a learning society. Scottish Affairs, 19 Spring: 77-91.

Schuller, T. Bostyn, A.M. (1992) Learning, Education and Training in the Third Age. Research Paper 3, Dunfermline: Carnegie Inquiry into the Third Age.

Schuller, T. Field, J. (1998) Social capital, human capital and the learning society. International Journal of Lifelong Learning, 17 (4): 226 – 235.

Shacklock, G. Thorpe, L. (2005) Life History and Narrative Approaches, In Somekh, B. and Levin, C. (Eds) Research Methods in the Social Sciences (156-163) London: Sage Publications.

Sims, J. (1998) Collecting and analysing qualitative data: issues raised by the focus group. Journal of Advanced Nursing, 28 (7): 343-352.

Somekh, B. and Lewin, C. (Eds) (2005) Research Methods in the Social Sciences. London: Sage Publications.

- Soulsby, J. (2000) Learning in the Fourth Age. London: DfEE.
- Spence D.P. (1982) Narrative Truth and Historical Truth. Meaning and Interpretation in Psychoanalysis. W.W.Norton & Company: New York.
- Stewart, D.W. Shamdasani, P.N. (1990) Focus Groups. Theory and Practice. London: Sage Publications.
- Swindell, R. (1997) U3A's in Australia and New Zealand: their value to the wider community and new directions for future developments. International Journal of Lifelong Learning, 16 (6): 474-409.
- Taylor, C. (1989) Sources of the Self. Cambridge: Cambridge University Press.
- Taylor, C. Smith, S. (2000) Practising Reflexivity in Health and Welfare: making knowledge. Buckingham: Open University Press.
- Taylor, R. and Ward, K (1986) Adult education and the working class: policies, practice and future priorities for community adult education. In: Ward, K. and Taylor, K. (Eds) Adult Education and the Working Class: Education for the Missing Millions.(169-191) London: Croom Helm.
- Tett, L (2002) Community Education, Lifelong Learning and Social Inclusion: Policy and Practice in Education Edinburgh: Dunedin Academic Press.
- The Joseph Rowntree Foundation's Older People's Research Programme (2000 – 2004)
<http://www.jrf.org.uk/knowledge/findings/foundations/044.asp> accessed 01/May/2004.
- Thompson, J.L. (1990) Hermeneutic inquiry. In Moody, L.E. Advancing Nursing Science Through Research Vol 2 (223-280) Newbury Park: Sage Publications.

Thompson, N. (2003) Promoting Equality Challenging Discrimination and Oppression. Basingstoke: Palgrave Macmillan.

Townsend, T. (1981) The structured dependency of the elderly: the creation of social policy in the twentieth century. Ageing and Society, 1 (1): 5-28.

Townsend, P. (1986) Ageism and social policy. In Phillipson, C. and Walker, A. (Eds) Ageing and Social Policy. (15-44) Aldershot: Gower.

Tuckman, B.W. and Jensen, M.A.C. (1977) Stages of small group development revisited. Group and Organisational Studies, 2: 419-427.

Tuckett, A. and Sargent, N. (1999) Marking Time: the NIACE survey on adult participation in learning. Leicester: National Institute of Adult Continuing Education.

Vincent, J. (1999) Consumers, identity and old age. Education and Ageing, 14 :141-158.

Walker, A. (1998) Speaking for themselves: the new politics of old age in Europe. Education and Ageing, 13 (1): 13 – 36.

Walker, A. Naegele, G. (1999) The Politics of Old Age in Europe. Buckingham: Open University Press.

Walker, J. (2000) Fifty plus learning: a consultation exercise. Education and Ageing, 15 (3): 297 – 313.

Walker, A (2001) The Growing Older Programme: Aims and Ambitions. ESRC Growing Older Programme. Papers from the launch of the conference: University of Sheffield. Sheffield.

Walker, A. Cook, J. (2004) European Research Priorities in the Field of Ageing, University of Sheffield.

Wells, C.V. (2000) The older student in a retired professionals' organisation. Education and Ageing, 15 (2): 239-249.

Wengraf, T. (2001) Qualitative Research Interviewing: Biographic Narrative and Semi-Structured Methods. London: Sage Publications.

WHO (1999) Global Movement for Active Ageing <http://www.int/hpt/globalmovement.index/htm> accessed 01/Mar/2003.

Williamson, A. (1997) "You're never too old to learn" third age perspectives on lifelong learning. International Journal of Lifelong Learning, 16 (3): 173 – 184.

Wilkinson, S. (1988) The role of reflexivity in feminist psychology. Women's Studies International Forum, 11 (5): 491-502.

Winter, R. and Munn-Dunning, C. (2001) A Handbook for Action Research in Health and Social Care. London: Routledge.

Withnall, A. and Percy, K. (1974) Good Practice in Education and Training of Older Adults. Aldershot: Ashgate.

Withnall, A. (1992) Towards a philosophy of educational gerontology: the unfinished debate. Journal of Educational Gerontology, 7 (1):16 – 24.

Withnall, A. (1997/8) Older Europeans in the learning society. Ageing International, XXIV: 46-63.

Withnall, A. (2002) Three decades of educational gerontology: achievements and challenges.
Education and Ageing, 17 (1): 87 – 102.

Withnall, A. Thompson, V. (2003) Older People and Lifelong Learning: Choices and Experiences.
Research Findings:13 Sheffield: ESRC Growing Older Programme.

Withnall, A. (2003) Reflections on lifelong learning and the Third Age. In Field J and Leicester M.
(Eds) Lifelong Learning: Education across the Lifespan.(289-299) London: Routledge Falmer.

Withnall, A. McGivney, V. Soulsby, J. (2004) Older People Learning: Myths and Realities Leicester :
National Institute of Adult Continuing Education.

Young, M. Schuller, T. (1991) Life after Work. The Arrival of the Ageless Society. London: Harper
Collins.

Yeaxlee, B. (1921) An Educated Nation. London: Oxford University Press.

Appendix 1 – Individual profiles of the nine participants compiled from their narrative interviews and transcripts

Participant 1 “Lifelong learning, the never ending story”

Age	Aged 67 at the time of the interview
Before school	No pre-school education. Found it difficult to remember or talk about her early life
Started school	At aged 5 but had little memory of primary school which was disrupted by the Blitz and evacuation. “I cannot remember learning to read”
Secondary school	“Failed 11+ and only stayed until 3A, played truant and left aged 14
After school	Went straight into civil service and did a day release shorthand and typing course
Employment	Civil service, a parent, worked in husband’s business and latterly as a personal assistant in a Human Resource Department in a local university
Formal education since school	Day release for shorthand and typing, attended a New Horizons course, an Arts Foundation course, successfully completed a Diploma in Business Administration and became a member of the Chartered Institute of Personal Development
Informal education	Evening classes, member of the WRI in both England and Scotland, completed the ABE tutor’s course, SQA in Dyslexia Support
Learning that is enjoyed most	“For me learning goes on eternally – standing with mothers at the school gate, and every time I read a bus timetable” “I like the formal stuff, reading, analysing and reflecting”
Hobbies	Reading, Tai Chi, cinema, theatre and music
Retirement	“When I had to at age 65”
After retirement	Work as an ABE tutor, a senior health mentor, took the Education for Participation course and completed an SQA in Dyslexia Support

Participant 2 First volume “Dire”, second volume “Emancipation”

Age	Aged 66 at the time of the interview
Before school	No pre-school activities, “led a very isolated childhood”
Started school	In 1945 and “I hated school”
Secondary school	In a Girls Public School, “helped out of school at 15 by a head teacher who said I was just a trifler” “leaving school was the happiest day of my life”
After school	Became a children’s helper, nursing auxiliary, a nanny, and was accepted for nursing in 1955
Employment	Nursing, became a Sister, then changed to social work at age 45 and became a Manager of a Day Care Unit
Formal education since school	Diploma in Nursing, Diploma in Social Work and various professional short courses
Informal education	Night school for higher English and various classes but with husband’s shift work this was difficult
Learning that is enjoyed most	“No time for formal learning”, like informal learning and continuous assessment
Hobbies	Bowling, badminton and walking
Retirement	“When I had to go at age 65”
After retirement	Attended the Education for Participation course, help at a health care department in a local University as a “live” patient

Participant 3 “The Rocky Road of Life”

Age	Aged 81 at time of the interview
Before school	No pre-school activities, just at home
Started school	In 1927
Secondary school	Public school in Edinburgh and left at 14
After school	Straight into an apprenticeship for engineering 1938 – 1943 – both electrical and mechanical and “worked for an excellent employer who gave every assistance”
Employment	Stayed with the original firm in the test plate section then transferred in 1944 to the sales department. Moved north to job as an Assistant Charge Engineer, then to a Shift Engineer working in various power stations until retirement in 1984
Formal education since school	Diploma in Engineering, various courses associated with work
Informal education	Various evening classes, reading technical manuals, practical work
Learning that is enjoyed most	Anything to do with engineering – liked electrical engineering
Hobbies	“Working with my hands”, building boats – “I have built four boats including a canal boat”, gardening, reading
Retirement	In 1984
After retirement	Community care activities particularly Remap, volunteering in residential homes for people with learning disabilities

Participant 4 “A Life Thinly Spread”

Age	Aged 78 at the time of the interview
Before school	No pre-school activities
Started school	In 1931 in Fife
Secondary school	Also in Fife and left at age 14 – was in the Home Guard as a boy
After school	Office work as a shipping clerk, at 18 joined the Scots Guards, trained as a mechanic, eventually part of a tank crew
Employment	Drill sergeant, de-mobbed in 1947, office work, community worker, and assistant minister, minister, and hospital chaplain, a J.P.
Formal education since school	Adult Residential College, University
Informal education	Cubs, Scouts, night school for book-keeping, secretary of a debating society at University, various courses
Learning that is enjoyed most	Reading, thinking, enjoyed the Education or Participation course
Hobbies	Reading, gardening, writing verse, the works of Robert Burns
Retirement	As a result of ill-health at age 64 in 1990
After retirement	“Invited to give talks in various places”

Participant 5 “Education is Life”

Age	Aged 72 at the time of the interview
Before school	At age 4, in a private nursery prior to starting primary school in a small boarding school
Started school	Aged 5 in the same small boarding school
Secondary school	During wartime in a Convent School – Girls Public School
After school	Did not go to University, did a secretarial course for one year, was a “frustrated mathematician” and “choices at school did not equip me for the

	things I wanted to do”
Employment	Secretarial work, worked as a secretary for a Medical Officer of Health within a children’s department, although a trained social worker did not work as one, looked after father’s house, administrative assistant in a hospital
Formal education since school	Diploma in Social Work, various secretarial qualifications
Informal education	Many evening classes, SCOTVEC modules such as book-keeping, voluntary work and corresponding training, and involvement with U3A
Learning that is enjoyed most	Working with other people
Hobbies	Bridge, art appreciation, local history
Retirement	Took early retirement in 1988
After retirement	“You can choose what you want to do”, training with Age Concern, U3A courses, Education for Participation and other associated courses with RBS COPA, involvement with housing associations

Participant 6 “Service to People”

Age	Aged 70 at the time of the interview
Before school	No nursery school – didn’t have them then
Started school	At age four and a half
Secondary school	Stayed in the same area and left at age 15
After school	Started working for the Post Office. Was Ferry Fair Queen in 1948
Employment	Postal assistant for fourteen years, left when the boss retired and was unemployed for a year, started holiday relief in the Post Office and was offered the job of Post Mistress in another small town and stayed there until 2002
Formal education since school	Learned on the job and had an excellent tutor. Went to night school and took shorthand and typing for three years – “got the certificates”
Informal education	Evening classes in woodwork, dressmaking, crochet – then took a crochet class (paid) for five years and have taken the Brownies for thirty-five years
Learning that is enjoyed most	“I enjoy every kind of learning”
Hobbies	Crocheting, reading, singing in the choir, bingo caller, “want to be able to pull a pint!”
Retirement	Retired at age 68 due to ill-health
After retirement	Treasurer of the Senior Citizen’s Group, President of the Senior Citizen’s Club (30 years) Guiding Ambassador, work in a charity shop one day a week

Participant 7 “Participation in life as it comes”

Age	Age 70 at the time of the interview
Before school	No nursery “nursery for me was being with all my cousins”
Started school	At age five in a Catholic School in West Lothian
Secondary school	Moved to a secondary school in the same area
After school	“Left school at 15 because Mum became ill and I could not stay on, I needed to get out and earn money”
Employment	Started as a confectionery assistant, worked in newsagents, in a solicitor’s office then in the civil service. Worked for the Scottish Court Service and was upgraded to an EO.
Formal education since school	“Learned on the job”, “went to night school in 1950 to learn shorthand, typing and accountancy – 120 wpm and 80 typing – got the certificate”
Informal learning	Nothing else apart from night school

Learning that is enjoyed most	“Learning by example and reading”
Hobbies	“Gardening, sewing and entertaining – although I have not been able to do this recently”
Retirement	At age 59 – “got a package from the civil service”
After retirement	Did not want to retire – got wage for six months then a friend asked me to help in a nursery school and I worked there doing admin for a couple of years”. Became a guide in an historical house and have worked there for eight years part-time” Secretary of the Senior Citizen’s Forum, secretary of the Ladies Club, help organise holidays for St Vincent de Paul, and work one day a week in a day centre

Participant 8 “From mediocrity to skill”

Age	Aged 75 at the time of the interview
Before school	No nursery school then – started school at 5
Started school	“Mother died when I was 4 and father died when I was 11” went to the local school
Secondary school	Left aged 14 in March 1944
After school	Became an office junior in a local aircraft company
Employment	Joined the army aged 16 and after this came back to the same company but in a different job. Worked as a punch card operator in charge of 15 others (all women). Went to work in Edinburgh in charge of a department. Married in 1954 and went South. Came back to Scotland before the birth of first child and worked as a cost clerk, then another job as a punch card operator. Worked in a computing firm until retirement at 60. Then got a job for five years with the Enterprise Trust
Formal education since school	Night school for bookkeeping, arithmetic and office organisation. Began the course for Institute of Cost and Works Accountants until the army. After the army did courses in pre-computer data processing. Went as far as part one of the final examinations of the Institute of Accounting. Night school for English and mathematics (gained A grade). Enrolled in OU and got a degree with honours
Informal education	Reading, various evening classes
Learning that is enjoyed most	Non-vocational learning, learning for fun. “Work was a necessity – happier now, although a bit too involved with the older people’s movement”
Hobbies	Read a lot, walk, go to the gym, ran in marathons for a while, music
Retirement	Eventually at age 65
After retirement	Involved in a lot of committees – particularly Better Government for Older People

Participant 9 “Seeing the light”

Age	Aged 73 at the time of the interview
Before school	No nursery school
Started school	Age 5, was evacuated because of the Blitz
Secondary school	Had to go by train to another town
After school	Left school at age 14- due to the death of mother. “Was only girl in the family with four brothers” “Tried to go back to school when father remarried at age 16 but this did not work”
Employment	Ran the house at 14 worked in the Co-op then in a factory as a clerkess until age 23. When the children were small, worked as a waitress in a local pub – for social reasons. When the children grew up, joined the civil service and were there for 23 years until retirement. Went in as a clerk and left as a

	clerical officer – also worked as an auditor there.
Formal education since school	Attended evening classes in 1970 and gained higher English, Ordinary Modern Studies and Arithmetic. Was given a day a week to go to college to study from the civil service and also passed the examinations for the civil service
Informal education	Nothing apart from evening classes
Learning that is enjoyed most	Like to be in classes with other people – “OU would not be for me”
Hobbies	Knitting, machine knitting – once made baby things to sell, crocheting, hill walking, aerobics, gym, started running at 53 and did half marathons, singing
Retirement	At age 60 but kept a job-share for three more years
After retirement	Involved in a lot of groups for older people – Senior Forum, Better Government for Older People, Lanark Senior Forum. “Post retirement has been more about learning than education and I believe that I have gained more confidence than actual knowledge” “If accepted for the Ransacker’s Project, I will study something useful about older people”

Appendix 2 - Collective profile of the nine participants in the study

Age	Between 66 – 81 Average age of participants - 72
Before school	Only one person had gone to a nursery – most had gone to school aged 5
Ways of describing school	“I loved school” “school just came easy” “I hated school” “I was lazy and mediocre” “I was frustrated at school” “Can’t remember much about school”
Left school	Seven left school at 14 – two left at 15
After school	Office work featured largely in this group’s work experience
Job/s	Administration and management, civil service, nurse, day care manager, engineer, minister of religion
Formal education	Night school featured in every person’s life, OU for two participants, various certificated activities linked with jobs, attendance at Adult Education College
Informal education	Evening classes, volunteering, arts activities, practical skills, Women’s Rural Institute, learning from life
Hobbies	Reading, sport, gardening, building boats, singing, crafts, bridge, bingo caller, singing, writing verse, aerobics, walking
Kinds of learning which the group enjoyed most	Learning with others, for fun – not certificates, learning by example, non-vocational learning, practical learning, reflective learning, from books
Retirement	Occurred for this group between 59 – 70
Ways of describing retirement	“retirement was traumatic” “I wept” “was keen to retire” “get out and do something else” “took early retirement because of a package that was offered” and two participants retired due to ill-health.
After retirement	Volunteering, U3A, community care activities, senior citizen activities, guide at an historic house, involvement in charity shops, involvement in BGOP, giving talks to students, Education for Participation, and continued activities emerging from this course, Senior Health Care Mentor, Adult Basic Education tutor, English as a Foreign Language tutor
Volunteering activities	Staffing a charity shop, Senior Health Mentor, Working with volunteer organisations, activities associated with the “Older People’s Movement” for example committee work, activities involved with the Girl Guide Movement
Reasons for coming to Ed for P. course	Retirement was traumatic, encouraged by a work colleague, liked the sound of it, heard about it through other activities, persuaded by a friend, like involvement with other people, sharing of ideas with others and collective learning
Reasons for agreeing to be part of this study	<ul style="list-style-type: none"> • “to keep brain active and stay functioning for longer” • “learning and health go together” • “learning in a group counteracts loneliness” • “felt that I had a contribution to make” • “keen to improve skills of participation” • “as you get older you become aware of what can go wrong with your mind and this was why I wanted to do it” • “interested in the ideas” • “education has been my “Achilles heel” • “interested in lifelong learning and it is part of me”

Appendix 3 - Analysis of member checking process: “putting the record straight”

Participant	Changes made by them to the transcript	My reflections
P1	Corrections to place names, tense and spelling	Wish for accuracy of the record
	Additions to clarify a point	Investment in the process – time had been taken to do this
	Erasing extraneous speech from text	What P1 would like to have said rather than the transcript “evidence”
	Addition of Diploma in Liberal Studies	Interesting clarification of qualification perhaps a growth of confidence in her ability?
P2	19 substantial corrections made (3 pages of changes).	Worried about the quality of the transcript in that she was inaccurate - rather than the possibility that I was. Describes her words as “gobbledegook”
	Clarification of the meaning of statements	A sincere attempt to “put the record straight”. Very circumspect about her own ability. Strong social conscience. Debt to others always reinforced in the checking
	Corrections to spelling, dates, times	
P3	Meticulous clarification and correction of dates, names and sequence of events	Felt he had “much more history” and that time precluded him giving more in the interview
	Substantial corrections to content about early childhood illness and the kindness of family and neighbours	Editorial changes were about his knowledge and recall rather than what was on the tape. Particularly wanted accuracy about what constituted “community”
		He omitted some personal history which he telephoned about later
P4	Many editorial changes to grammar, spelling, place names, names of people and to tenses	Telephoned before the focus group to say that he was “appalled” at his omissions and that he had not remembered important information about his contribution. Concerned about accuracy and to set the record straight
	No substantial changes to text	
P5	Additions to transcript to clarify meaning	Great wish for accuracy – she had missed out some of her contributions in teaching and voluntary activity which she wanted to note.
	Clarification of names, dates, places	Investment in the process – apologised for being unable to attend the second focus group but offered her help in any other way
	Amended typographical errors	Transcript does not always reveal this person in a sympathetic light – but there

		was no changes made to this
	Filled in inaudible gaps on the transcript faithfully	
	No substantial changes but there were omissions which she wished to rectify – noted in the accompanying letter	
P6	Minimal changes – corrections to the name of a school, to a sequence of events some names and tenses	This is a personally revealing story and I was surprised that there were so few corrections. Learning is intimately connected with her life trajectory and more related to practical skills than knowledge
P7	Minimal changes – addition of age Extraneous speech erased Additions to text to clarify meaning Corrections to tenses and spelling	Carefully edited with annotations similar to those a legal secretary might make. More detached than the others in ethos and tenor. Learning is always intimately connected to work
P8	Corrections about specific information, place names and dates Anomaly in the transcript corrected	Read very carefully and returned very speedily
	Careful editorial changes to incorrect spelling of Latin names or to names of philosophers.	Asserting knowledge in areas that are very important to him
	Did not always fill in the gaps in the transcript where the voice was inaudible	
P9	Corrections to spelling and sections of text which did not read accurately e.g. in the transcript it states “father remarried again” which is on the tape – this was changed to father remarried	Important editorial correction for the meaning of the transcript
	Addition of words to make the meaning clearer	Carefully read but no real assertion of identity/self in the corrections
	Added in the gaps in the text e.g. “formal” qualifications rather than “a form of qualification”	

Appendix 4 - Audit trail concerning my analytical processing of the focus groups, narrative interviews and reflective diary

Findings in this study emerged from transcripts of the three focus groups, the nine in-depth narrative interviews and my reflective research diary. This resulted in three group transcripts of approximately twenty pages in length and nine interview transcripts with an average length of eighteen pages. Definitions of categories, sub-themes and themes are in the Glossary of Terms and Working Definitions situated at the beginning of the thesis.

Focus groups – audit of decisions and procedures

- Notes from the focus group taken by the note taker (F.O'May, a member of staff from the RBS Centre for the Older Person's Agenda) were read within twenty-four hours (there were indications where non-verbal reactions were evident and this was checked with my reflective notes)
- I wrote my reflective notes in my research diary
- Tapes were transcribed by a third party and returned within two weeks
- I re-read the transcripts and re-played the tapes to check for accuracy and to insert audible emotional reactions
- Each line in the transcript was numbered and participants were coded and anonymised
- Transcripts were read in relation to the questions providing the focus for the group to get a sense of the total group ambience, key players and central concerns of the group in relation to the focus group questions. Particular attention was paid to interactive sequences using Kitzinger's (1994) consensual and argumentative communication patterns and group dynamics. Notes were made in reflective diary
- First stage analysis of allocating analytical categories and then linking them together to form emerging sub-themes which were identified using constant comparison (DePoy and Gitlin 1994)
- Analytical categories also allocated independently by the note taker from her experience in the group
- Second stage analysis of comparison of my categories with the note taker's and re-categorising

- Third stage analysis where I finalised sub-themes and the overarching main group theme was identified
- Selection of interactive sequences to illustrate sub-themes and how those fitted with overarching themes for each focus group in the findings chapter

Narrative interviews – audit of decisions and procedures

- Reflective notes written within twenty-four hours
- Transcripts returned from typist within two weeks and checked with the tape for accuracy and audible emotional expression
- Each line in the transcript was numbered
- I devised an individual profile for each participant from Section 1 of the interview schedule and ultimately a group profile found in Appendix 1
- First stage analysis - transcripts read to get a sense of the whole story and notes taken about the similarities in types of stories i.e. narratives of contribution. This was for sharing with participants in the second focus group. At this point analysis was about **what** was said rather than **how** it was said (Reissman 2004)
- Second stage analysis - allocation of analytical categories on the transcripts (the analytical categories in the transcripts of the first and the last interviewees were double checked with my supervisor and another member of staff at Edinburgh University in February 2005) The purpose was to tease out similarities or differences in interpretation of analytical categories
- Collapsing of analytical categories into sub-themes of: effects of early schooling, turning points in learning, retirement and lack of closure
- Third stage micro-analysis – using Labov's (1977) sociolinguistic analysis as a means of understanding narrative structure and as a heuristic device to explore evaluations (meanings) within selected narrative sequences. I particularly wanted to find a means of accessing how participants attributed evaluations (meanings) to issues about learning and education in their lives
- Selection of narrative sequences to illustrate micro analysis and the contribution to sub-themes in the findings chapter
- Abstraction of those sub-themes and narrative sequences into overarching theme of identity and the idea of learning selves

Analysis of the research process (found in Section 3 of Chapter 4)

This was a two-fold procedure involving:

- analysis of my reflective diary entries
- synthesis of findings from the focus group and interviews shown in Figure 2

Analysis of reflective diary entries

- Identification of unfolding dynamics within the groups including the briefing and debriefing group using Johns (2000) model of reflection and Tuckman and Jensen's (1977) stages of group development (forming, storming, norming, performing and adjournment). A sequential approach to events over the year was taken including the Postscript to note changes in participation and dynamics
 - Identification of specific collaborative activity between the group and me
 - Reflexive analysis of my approach and how intra-subjective and inter-subjective dynamics could influence my interpretation of findings using Wilkinson (1988)
- (Section 4 of Chapter 4)

Synthesis of findings with wider policy issues detected in the literature review

- Comparing the group profile in Appendix 1 and learning and educational experiences with unfolding lifelong learning ideas and policies found in chapter 5
- Synthesis of key themes from the collective and personal views of the participants about the meaning/s of learning and education with the aims and visions of lifelong learning policy

Appendix 5 - Example of how analytical categories were merged into sub-themes and eventually into the overarching group theme

First Focus Group (Material taken from pages 7/8 of transcript and specifically Lines 256-375)

I allocated analytical categories to text in the transcript margins based upon my understanding of the responses of participants and central concerns of the group in relation to the focus group questions. Emphasis was on interactive sequences. Analytical categories were then linked together using constant comparison to form emerging sub-themes and in this example the identified sub-theme was *exclusion on the basis of the presentation of the summary version of the policy*.

Categories were then allocated independently by another staff member from the RBS Centre for the Older Persons' Agenda (F.O'M.). This member of staff had been a note-taker in all focus groups, so had experienced the ethos and development of each group. I asked her to read each full transcript from the three focus group meetings and to allocate analytical categories according to her perception of what participants said in response to the issues identified for each group and how the group interacted.

I considered my analytical categories and emergent sub-themes as indicated in the table alongside those categories attributed by F.O'M. noting similarities and differences in wording and meaning. In this example the essential issue captured independently by both of us was about how the summary version was presented. I then finally decided upon sub-themes. The final analytical process was deciding upon the main group theme from each focus group meeting by merging sub-themes into the overarching theme, which in the case of the first focus group was *exclusion* as shown in the table.

Example of how categories were distilled into sub-themes and then into main group theme

F.O'M. (Note-taker in all groups)	Analytical categories allocated	Sub-theme	Main group theme from first focus group meeting
	Design of document poor Words too general and meaningless Language difficult and off-putting Who was consulted/involved in drawing up the document? Surface meanings/true meanings? No mention of older people		
		Exclusion on the basis of the presentation of the summary version of the policy	Exclusion
SB	Exclusive documentation No mention of older people Poor design – but on right colour of paper – black! No mention of action Audience for the policy? Responsibility for operationalising it?		

Group Interaction – This sub-theme of *exclusion on the basis of the presentation of the summary version of the policy* involved eight verbal exchanges from participants and Participant 6 gave non-verbal signals, which were in agreement with the tone of the group. Exchanges were mainly **complementary** for example:

Participant 3 responding to Participant 1 in L.280 “I back you up there, its language, language, language and no goal at the end!”

I am heard on the tape and noted in the transcript to attempt a broadening out of the debate by suggesting that older people may be implicitly included and that there are virtues in the presentation – but the group did not accept those suggestions. Members proceed to give examples of where the policy presented a perceived negative message for older people, for example in response to my comment about the groups who were consulted:

Participant 8 L.356 retorts “Aye, forums, forums and panels but the composition isn’t given”

Appendix 6 - Selected examples of how analytical categories from the narrative interviews were merged into a theme

Participant	Categories	Theme
Participant 4	L56 I was de-mobbed in 1947 and with the encouragement of my minister I trained at an Adult Residential College on a course for community work	Turning points in learning identity
	L67 after three years, it suddenly dawned on me that I didn't want to run youth clubs all my life	
	L69 with the encouragement of the Principal, I went to Glasgow University, then to St Andrews to study theology	
	L 81 it was a calling – it had to be a calling on the sort of salary we worked on!	
	L216 one of the strongest influences was the Iona Community	
	L339 the army experience was really pivotal and influential I think	
Participant 5	L188 you need two years to adjust at least [after husbands death] and then I started having the ability to do voluntary work	
	L191 I went on a pre-retirement course with WEA and it was excellent – that didn't have a certificate attached to it but it was invaluable and I met people there that I still know.	
	L473 [widowhood] is another of life's learning curves of course, and probable that teaches you a hell of a lot more than any academic training will ever teach you	
Participant 6	L268 [being unable to have children] the doctor said "get yourself involved with children" and that's how I got started with the Brownies	
	L294 now I'm a Guiding Ambassador – when someone wants to join the Guider Movement they come to me and I tell them my experiences	
	L330 when I became ill that was a really big blow and J. said that it was a turning point for me	
	L319 I was asked to become a counsellor	
	L286 I listen before I try to solve now - before I would go in like a bull in a china shop	

Those examples reveal the importance of learning from experience and the value attached to life events. Identified turning points necessitated acceptance of the change, then adjustment and adaptation.

Appendix 7 – Elements within the narrative structure

Personal narratives are knitted together and hold meaning by a structure that contains certain elements according to Labov (1977). Those elements are:

- **Abstract:** this contains clauses that summarise the issue and suggest what the actual story is about.
- **Orientation:** this element establishes the context in terms of the time, place, and people involved.
- **Complicating action:** this element offers a sequence of events which covers what happened and it catches the attention of the listener to follow what might happen next.
- **Evaluation:** this element outlines the significance and the meanings inherent in the narrative. It is considered to be the most important element and is scaffolded by the preceding elements.
- **Resolution:** this penultimate element reveals what finally occurred.
- **Coda:** this final element is a verbal sign that the narrative has finished and it is the sign of closure of the narrative.

Elements do not have to follow a line by line pattern. Also, all narrative sequences may not follow this precise pattern. For example, the interviewer may provide the abstract and instigate a particular sequence. It is the evaluation, which is the vital element, and by studying sequences it is possible to appreciate and understand how people connect events and issues in their lives.