

INTERNATIONAL ISSUES IN ADULT EDUCATION

Lifelong Learning in Later Life

A Handbook on Older Adult Learning

Brian Findsen and Marvin Formosa



SensePublishers

Lifelong Learning in Later Life

INTERNATIONAL ISSUES IN ADULT EDUCATION

Volume 7

Series Editor:

Peter Mayo, *University of Malta, Msida, Malta*

Scope:

This international book series attempts to do justice to adult education as an ever expanding field. It is intended to be internationally inclusive and attract writers and readers from different parts of the world. It also attempts to cover many of the areas that feature prominently in this amorphous field. It is a series that seeks to underline the global dimensions of adult education, covering a whole range of perspectives. In this regard, the series seeks to fill in an international void by providing a book series that complements the many journals, professional and academic, that exist in the area. The scope would be broad enough to comprise such issues as 'Adult Education in specific regional contexts', 'Adult Education in the Arab world', 'Participatory Action Research and Adult Education', 'Adult Education and Participatory Citizenship', 'Adult Education and the World Social Forum', 'Adult Education and Disability', 'Adult Education and the Elderly', 'Adult Education in Prisons', 'Adult Education, Work and Livelihoods', 'Adult Education and Migration', 'The Education of Older Adults', 'Southern Perspectives on Adult Education', 'Adult Education and Progressive Social Movements', 'Popular Education in Latin America and Beyond', 'Eastern European perspectives on Adult Education', 'An anti-Racist Agenda in Adult Education', 'Postcolonial perspectives on Adult Education', 'Adult Education and Indigenous Movements', 'Adult Education and Small States'. There is also room for single country studies of Adult Education provided that a market for such a study is guaranteed.

Editorial Advisory Board:

Paula Allman, Research Fellow, University of Nottingham, England

Stephen Brookfield, University of St Thomas, Minnesota, USA

Phyllis Cunningham, University of Illinois, Urbana Champagne, USA

Waguida El Bakary, American University in Cairo, Egypt

Budd L. Hall, University of Victoria, BC, Canada

Astrid Von Kotze, University of Natal, South Africa

Alberto Melo, University of the Algarve, Portugal

Lidia Puigvert-Mallart, CREA-University of Barcelona, Spain

Daniel Schugurensky, OISE/University of Toronto, Canada

Joyce Stalker, University of Waikato, Hamilton, New Zealand/ Aotearoa

Juha Suoranta, University of Tampere, Finland

Lifelong Learning in Later Life

A Handbook on Older Adult Learning

Brian Findsen

University of Waikato, New Zealand

Marvin Formosa

University of Malta, Malta



SENSE PUBLISHERS
ROTTERDAM/BOSTON/TAIPEI

A C.I.P. record for this book is available from the Library of Congress.

ISBN: 978-94-6091-649-6 (paperback)

ISBN: 978-94-6091-650-2 (hardback)

ISBN: 978-94-6091-651-9 (e-book)

Published by: Sense Publishers,

P.O. Box 21858,

3001 AW Rotterdam,

The Netherlands

www.sensepublishers.com

Printed on acid-free paper

All Rights Reserved © 2011 Sense Publishers

No part of this work may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, microfilming, recording or otherwise, without written permission from the Publisher, with the exception of any material supplied specifically for the purpose of being entered and executed on a computer system, for exclusive use by the purchaser of the work.

This first truly comprehensive interdisciplinary, international critique of theory and practice in lifelong learning as it relates to later life is an absolute tour de force. It opens up new vistas for discussion about learning and education as we grow older whilst remaining accessible and engaging in its structure and approach. It will appeal not just to academics but to a range of professionals interested in different facets of ageing including the contributions older people can make to their communities in a climate of rapid change. It deserves wide recognition and debate.

Alexandra Withnall, Universities of Warwick and Leicester, UK.

This is an important and apt book which takes up a subject which tends, unfortunately, to be neglected in the now very ample literature on lifelong learning; the subject of learning in later life. This is because much of that literature has been occupied with an economic agenda, especially with issues of performativity (how to deliver successful outcomes effectively and efficiently), employability, and knowledge production. Even today it remains a struggle to persuade ordinary people that learning is something that is possible and desirable in later life, and policy makers that older learners are worth investing in, not just socially but even economically. Findsen and Formosa's handbook is valuable in this context because it provides a comprehensive coverage of the subject in a scholarly way that is available also to the non-specialised reader. Impressive in its scope it seeks to describe older learning critically within the lifelong learning literature at the same time that it makes a strong and persuasive case for taking older learning seriously in our postmodern world.

Kenneth Wain, University of Malta

This is a book that needed to be written: it provides a most thorough and skilful analysis of a comprehensive range of contemporary literature about learning in later life from many localities and countries of the world. It combines old and new perspectives and locates the discussion in the wider fields of adult learning and the learning society. This is an excellent contemporary reference book about the theories, practices, developments and outcomes in third and fourth age learning in both formal and non-formal contexts. It is an essential text for students, practitioners and policy makers.

Peter Jarvis, Professor Emeritus, University of Surrey

DEDICATION

Marvin dedicates this work to his wife, Fiona

Brian dedicates this book to his lifetime friend and wife, Caterina

TABLE OF CONTENTS

Series editor's preface	xi
Acknowledgements	xvii
1. Introduction	1
2. Ageing, older adults, and later life	7
3. From 'adult education' to 'lifelong learning'	21
4. Lifelong learning and the emergence of the learning society	35
5. History and development	49
6. Psychology of older adult learning	63
7. Understanding older adult learners and education: sociological perspectives	77
8. Rationales for older adult learning	89
9. Geragogy	103
10. Participation for and barriers to learning	117
11. Formal and third age learning	131
12. Learning in non-formal and informal contexts	145
13. Learning and health in later life	157
14. Intergenerational learning	171
15. Concluding comments	185
References	189
Name & subject index	213

SERIES EDITOR'S PREFACE

I welcome the completion of this marvellous volume on an important aspect of international adult education. This is a collaborative endeavour by two of the finest scholars in the field of educating older adults. One of these is a specialist in the area from New Zealand, the other is a sociologist focusing on gerontology from the University of Malta. Both boast an impressive publication track record on the politics of aging.

The education of older adults has, for quite some time, been featuring in the adult education literature through the works of such authors as Alexandra Whitnall, Keith Percy, Eric Midwinter, the late Cambridge history professor, Peter Laslett, the late Frank Glendenning, Paula Allman (who subsequently moved on to dealing with other issues), Ron Manheimer, Dorothy MacKeracher, Roy Carole and the two authors of this volume. The scope of analyses has been impressive ranging from discussions concerning learning in later life in general to universities of the Third Age (the subject of excellent critiques, based on Bourdieu's concept of distinction, by Formosa) to old age learning as a form of social movement learning as well as learning for social awareness and change (see Roy's work on BC's 'raging grannies'). A common thread throughout these writings is the notion of older adults as subjects and therefore social actors as opposed to the more conventional pathologising accounts of individuals in older age.

Some of the finest and more perceptive writings on learning in older age and on older age in general debunk some of the stereotypes surrounding this variegated category of people and citizens. Old theories and paradigms of thinking are refuted outright, paradigms reflected in such inane comments as 'you cannot teach an old dog new tricks' and other graphic illustrations concerning intelligence such as the gradually descending curve featured in such psychology textbooks as Alice Heim's (1970) *Intelligence and Personality*. Furthermore we often come across glib statements such as that by the septuagenarian, former 60s-70s rock icon, now turned painter, Grace Slick. The television network CBS issued a profile of Grace Slick in which she states: "When you're old, you should be heard and not seen, when young you should be seen but not heard..." (Grace Slick Profile - CBS, 2011). This comment might well fit into the stereotype that "older adults should render themselves invisible in a youth-oriented society" (Findsen, 2005 : 439). I wonder what such crowd-pullers as Ian Anderson, Carole King, Bob Dylan, Joni Mitchell, Eric Clapton and John Mayall would have to say about this piece of witticism from a remarkable woman who once wrote powerful lyrics fronting the legendary S. Francisco Band, Jefferson Airplane. And, true to her remarkable and creative personality, she serves as a great role model for people in Third Age by reinventing herself as a painter.

Adult education too has had its version of a role model for people in their third age in the form of Paulo Freire. In his late sixties and early 70s, Freire would pull crowds wherever he spoke. He tried to make up for the lost time in exile, severed

from his roots, by serving as Education Secretary in the PT Municipal Administration and taking on the onerous task of reforming the entire public education system in the megalopolis of São Paulo in Brazil. As a speaker, he was 'seen' as well as 'heard,' and often ushered into auditoriums as though he were a rock star, even though his looks were those of an Ancient Greek philosopher, a Socrates. He would write in *Pedagogy of the Heart*:

I was returning hopeful, motivated to relearn Brazil, to participate in the struggle for democracy...As I write this at seventy five, I continue to feel young, declining - not for vanity or fear of disclosing my age - the privilege senior citizens are entitled to, for example, at airports...People are old or young much more as a function of how they think of the world, the availability they have for curiously giving themselves to knowledge.

Freire, 1997 : 72

Pathologising older adults also entails adopting the medical model when dealing with issues and policies concerning people falling into this large and variegated age bracket. People are expected to view themselves in a system shaped by and for people of a younger age and are otherized or pitied for not conforming to the societal norms, without asking: who sets these norms and in favour of whom? But adult education is also replete with literature in which older adults learn and impart the fruits of their learning, resulting from a social construction model of old age. This is one that can make them react politically and collectively to disabling environments, often in the form of older adults' movements or political parties. Older adults in Copenhagen are visibly active in different walks of life not least in reinventing themselves as jazz players in public arenas. In British Columbia they take on the role conventionally attributed to student movements on campuses and in the public sphere as they use their wit and imagination to raise awareness regarding local and global ills as well as target policy makers and politicians when doing so. The 'raging grannies' earned themselves a lot of publicity with their takes on issues concerning nuclear proliferation, environmental degradation and so forth, as amply demonstrated by Carole Roy and other writers.

Others engage in pensions associations, political-party veterans' clubs or remain active within movements to which they helped give rise in the past. Here we have the sense of older adults as social activists. And yet not all adults have the opportunity to engage in such activities, which, as with all social movements, have a learning dimension. They are denied such opportunities in the same way they are denied opportunities to engage in such romanticized older adult education leisure pursuits as joining Universities of the Third Age or Elderhostels, the latter involving learning through travel. There are, after all, 'older adults and older adults' just as there are 'workers and workers.'

Social class plays an important role here. The romanticized versions of Older Age adult education we often come across are those belonging to the middle class and especially those categories of the middle class which have not become déclassé. This applies to not only U3As and Elderhostels but also to church

organizations and other veterans' clubs. It also applies to older adults gaining access to universities and other centres of higher learning. One of the major challenges for adult educators is that of targeting older adults threatened by or suffering from poverty or social restrictions including mobility impairment or limited financial means which prevents them from engaging in a variety of pursuits.

For many older adults, who are able-bodied but denied financial stability, continuing employment is not an option but a necessity. Moreover we are living in an age when demographic shifts are compelling people to continue working beyond conventional retirement age. An EAEA report on trends and approaches to adult education confirms this (EAEA, 2006). The discourse regarding the vocationalisation of adult education is getting stronger now that even the situation of older adults is being dragged into it. Many countries, especially in the western world, are experiencing an aging population and are grappling with how to prepare for and accommodate older adults' needs. Let us take Italy as an example. An ISTAT (2010) press release states that Italy has an increasingly elderly population. On 1 January 2010, individuals aged 65 + years represented 20.2 per cent of the population (as compared to 18.1 per cent in 2000), while minors represented only 16.9 per cent (17.5 per cent in 2000). Youths aged 14 are under represented 14 per cent (14.3 per cent in 2000) (Eghbal, 2007):

- Concurrent with the expected reduction in population, those aged over 65 are growing in numbers. They numbered 11.6 million in 2006 compared to 8.2 million of those aged 0-14 years. The former age group has grown by 10.4 per cent between 2001 and 2006 whilst the latter group has grown by 1.9 per cent.
- There are 12.7 million pensioners in Italy, accounting for 21.6 per cent of the population in 2006 compared with 18.0 per cent for the Western European average.

Projections for its close neighbour, Malta, indicate that the number of persons in the 65+ age bracket is expected to increase to 20 per cent in 2025 and to 24 per cent in 2050 (NSO, 2009). The situation in these countries is not any different from the rest of Europe (Turkey is one notable exception since it has a very young population).

Europe is not alone, as a continent, in having an ageing population and a decreasing birth rate throughout. The rise of this sector of the population has rendered it an important target for social-oriented adult learning, with NGOs, including those tied to various denominational churches in Europe, playing an important part in this context. The Council of Europe had, as far back as 1988, identified 'Education of the Elderly' as one of its two main topics (the other was 'adult education and the long-term unemployed') in its programme 'Adult Education and Social Change' which came to an end, following a series of meetings and topic group study visits, with a conference in Strasbourg in 1993.

The great demographic shifts that have occurred have led the post-welfare State to consider pensions unsustainable. Suddenly older adults are being regarded as

important prospective members of the labour force. The retirement age for certain occupations is being raised and we often come across seminars discussing the feasibility of older adults being gainfully employed past the conventional retirement age. The discourse about adult education for the elderly has shifted from one that focused on non-instrumental learning, including the middle class-oriented Universities of the Third Age (Formosa, 2000, 2007), Elderhostels and the more popular community groups, to one that is increasingly becoming vocationalised. An EU commissioned report concerning trends and approaches to adult education in Europe emphasises this point and welcomes the trend to allow retooling of older adults for further employment (EAEA, 2006). It is argued that older adults have much to offer to the economy, as long as their labour skills are retooled. As a result, it is further argued, they would no longer be a burden on the state. I would add that they would thus fall prey to the market which is now rendering pensions an individual rather than a social concern. In Europe, older adults are now being encouraged to continue working after 60 with the retirement age in many places being raised to 65, and older adults are being encouraged to work beyond this age. There seems to be no regard for the reality that there are different types of work which require different types of workers. It is conceivable that a university professor continues in her or his same job till 70 but the question must be asked: Would this apply also to people involved in masonry with their dwindling physical prowess? Even the great Michelangelo had to concentrate on less strenuous artistic work in his older years than sculpturing in marble. Some kind of vocational education would be warranted. I once witnessed the work of a masonry cooperative in Porto, Portugal where masons eventually become instructors at the cooperative's training centre when they reach a certain age. Presumably this also requires some retooling in the form of pedagogical education. In short, the vocationalisation of adult education as a discourse is all pervasive, and serves to render 'human capital theory' a feature of the education of adults not only below the third age but also within this age category. This issue necessitates engagement in not only psychological but also sociological, and more specifically political-economic, enquiries concerning older adults and their challenges for learning. It also requires analyzing the education of older adults within the context of hegemonic globalisation and its underlying neo-liberal ideology.

However the education of older adults takes on a variety forms. Among these are art classes or projects involving the visual arts. This was the area in which I carried out my first activity when working as an adult education organizer in the education department in my home country. The project consisted of a group of young art educators facilitating a process whereby older parishioners in my residential town were encouraged to take up paint and brushes and engage solely or collectively in visual expression. It took long for the ice to be broken but once one person made the first move others followed suit. They admitted to discovering aspects of their own personality which were hidden throughout most of their adult life, often discovering creative streaks which they thought they never had or which were suppressed by the system world in which they operated. Activities such as these also served as a means of socialization and of overcoming the boredom of an

otherwise isolated life inside the home. Other older members of the same community frequently join younger members in parish choirs and seek educational fulfilment in learning to read music and sing. Others find solace in games such as scrabble, joining national championships and honing their skills also at home on the internet. Others, who still benefit from a decent pension, stake a more active part in community politics availing themselves of time on their hands to contest elections for local councils.

There is, however, an urgent need for the provision of general adult education targeting the many *old people's homes* that are mushrooming everywhere in Europe. Adult Education should constitute an important feature of activity in these homes that can serve to improve the quality of life of the residents and therefore make the prolongation of life desirable. There is a need for the preparation of a specialised cadre of adult educators who can provide meaningful educational experiences among older adults in these homes. Some countries are well advanced in this feature of adult education but many others are light years away. Such activities can allow residents in these homes to continue to function as citizens and there is an argument to be made in favour of conceiving of such an education as being an education for prolonged citizenship. Keeping old people in a state of inertia, passively awaiting death, is a denial of the right to citizenship, a genuinely active one which an adult education, that focuses on activity driven and at times collective learning, and which draws on the activation of the learners' otherwise hidden and corroded skills and knowledge, can help keep in motion.

The foregoing ideas connect with some of the many issues concerning the education of older adults which Brian Findsen and Marvin Formosa raise and discuss in this wonderful and detailed volume. There is much material which can stimulate the imagination of educators and the older adults themselves to organise their educational activities in meaningful ways. Any series on international issues in adult education would cry out for a book such as this. Enjoy the read!

Peter Mayo
University of Malta
20 May 2011

References

- EAEA, (2006). *Adult Education trends and issues in Europe*. Restricted tender No. EAC/43/05 as completed by 11th of August 2006. Brussels: European Association for the Education of Adults.
- Eghbal, M. (2007). Italian ageing and declining population will affect consumption. Retrieved May 23, 2011, from <http://www.euromonitor.com/italian-ageing-and-declining-population-will-affect-consumption/article>.
- Findsen, B. (2005). Older adults' learning. In L. English (Ed.), *International Encyclopedia of Adult Education* (pp. 430-442). Basingstoke (UK) and New York: Palgrave-Macmillan.

SERIES EDITOR'S PREFACE

- Formosa, M (2000). Older adult education in a Maltese University of the Third Age: A critical perspective. *Education and Ageing*, 15(3), 315-339.
- Formosa, M. (2007). A Bourdieusian interpretation of the University of the Third Age in Malta. *Journal of Maltese Education Research*, 4(2), 1-16.
- Freire, P. (1997). *Pedagogy of the heart*. New York: Continuum.
- Grace Slick Profile - CBS, (2011). *Grace Slick Profile - CBS 08/03/09* online video. Retrieved May 30, 2011, from <http://www.youtube.com/watch?v=GAIQf-jQhWI>
- Heim, A. (1970). *Intelligence and personality: Their assessment and relationship*. Harmondsworth, Middlesex:Penguin Books Ltd.
- ISAT, (2010). *Demographic Indicators Year 2009 - 18th February 2010*. Rome: Istituto Nazionale di Statistica.
- NSO, (2009) *Demography review 2008*. Malta: National Statistics Office.

ACKNOWLEDGEMENTS

We would like to thank the many people whose help and support has proved invaluable in the preparation of this book. We are particularly indebted to Peter Mayo for his encouragement and patient advice. Special thanks also go to those people who gave up their time to inform us about their work with older people, and who sent us needed literature, particularly Sue Jackson, Barry Golding, Ronald J. Manheimer, and Alex Withnall.

For Brian while in the UK (2004–2008), the stimulation to enquire further about older adults' learning emerged in part from his networking with the Association of Education & Ageing (UK), particularly through Jo Walker, Jim Soulsby and Alex Withnall. He is appreciative of on-going dialogue via this network. At the University of Waikato, New Zealand, he acknowledges the support from Jan Appleton in the Waikato Pathways College who helped with presentation protocols.

We are also grateful to Peter de Liefde and the staff at Sense Publishers. Finally, we both would like to thank our respective wives, Caterina and Fiona, who provided consistent support for our academic career and the writing of this book. Both sacrificed quality family time so that this book could come to fruition.

INTRODUCTION

National policy statements on ‘lifelong learning’ and ‘population ageing’ abound. As nations, inter-governmental parliaments (such as the European Union), and international agencies (ranging from the UNESCO to the World Bank to the OECD) became increasingly preoccupied with the crises in economic competitiveness and political integration, they looked towards lifelong learning as the key in improving economic development and social cohesion. Lifelong learning has become a strong catchphrase during current times, a slogan bandied about in conferences, symposia, and seminars by students, non-governmental organisations, academics, policy-makers, politicians, trade unionists, and employers alike. Population ageing constitutes another contemporary ‘buzzword’ in the policy vocabulary. As international fertility rates plummet and healthy life expectancies ascend, all countries in the world are experiencing an unprecedented number and percentage of persons aged 60 plus. Nowadays, there exists no comprehensive international or regional policy framework which does not dwell to some extent on the need for adequate and sustainable pension systems, the requirement of a synergic public-private mix in caring services, and for a stronger solidarity network across generations. So intense is the focus by policy makers and politicians on population ageing, that the European Union has designated the year 2012 as the International Year for Active Ageing.

This handbook focuses on the interface between these two facets of interest, that of lifelong learning and population ageing. Its goal is to explore, analyse and discuss the potential of lifelong learning for those cohorts who have reached the later years of the life course, and at the same time, discuss the role of older adults in the complex terrains of lifelong learning¹. We believe that this ambition is highly warranted since the fields of lifelong learning and later life tend to lead separate lives, and it is only recently that policies on lifelong learning and population ageing have been awarding space to each other. Suffice to say that senior citizens and the context of later life found no space in European Union policies on lifelong learning until the document *Adult Learning: It is never too late to learn* (EC, 2006), as much as eleven years following the initial White Paper on *Teaching and learning: Towards a learning a society* (ibid., 1995). Indeed, lifelong learning policy and research tends to remain located in, and around, the younger and adult ‘territories’ of the life course. Older adults are generally excluded from both theoretical and empirical analysis on the assumption that their advanced calendar age is not sufficiently unique to generate new knowledge trends in lifelong learning. The opposite is also true, as many comprehensive handbooks on social gerontology tend to exclude any discussion of the possible roles and potential of lifelong learning in later life (e.g. Johnson, 2005; Binstock & George, 2006). Indeed, one does not have to go back many years to find a time when it was

widely thought that adults could not learn anything novel - indeed, 'you cannot teach an old dog new tricks!' - and that intelligence generally declined with age (Jarvis, 2009).

This is, of course, not the same as saying that this handbook pioneers the discussion of lifelong learning in later life, but only that it throws light on an area of study which, in our opinion, is crucially understated. Indeed, the planning, carrying out, and completion of this handbook would not have been possible if we were not standing on the shoulder of giants. The works of David A. Peterson, Peter Jarvis, Ronald J. Manheimer, Frank Glendenning, David Battersby, and Alex Withnall, to mention a few, have all stimulated us tremendously as why and how older adults learn. Our ambition in this handbook is to make a focused contribution to the debate of older adult learning through an informed and critical analysis of its underlying philosophical bases, and practical trends and patterns. As such, this handbook is not an introspective study of individual learners, or a how-to manual in setting up elder-learning programmes. The purpose of this handbook is to take a comprehensive look at the phenomenon of older adult learning, one which maps the territory in light of the emergent learning theories, research and policies. There is no doubt that the recent and ongoing debates on lifelong education, lifelong learning, and learning societies warrant a new perspective on the field of educational gerontology, one which relocates the discussion away from 'education' to a debate as how older adults - whether they perceive and identify themselves as learners or not - can become incorporated in the learning revolutions underway. Indeed, a key objective of this handbook is to set up an agenda for the future as the regards the practice of older adult learning. It does so by discussing the participation patterns of older adults in education, by highlighting studies which draw on psychological models of behaviour that analyse learning behaviour in terms of personal motivations, as well as sociological analyses which look at participation in terms of social groupings and collective life course experiences. The handbook also debates dominant typologies to identify barriers to people's participation in learning activities - namely, situational, institutional, informational, and psychosocial barriers - with a stress on the necessity for educators to learn how to remove their institutional blinders and recognise that the realities of self-directed and independent learning that occur outside of institutional structures. At the same time, we hope that this handbook exposes those negative stereotypes about learning in later life in the attempt of educating the public on this issue, as well as encouraging older learners to value their own learning and take pride in their own achievements. It is the intention that this handbook also acts as a persuasive argument for formal and non-formal learning agencies to open more doors for older adults.

This handbook will primarily appeal to educators of older adults; students in higher education who study and research adult education, gerontology, social work, nursing education and social policy; academic administrators who have compelling socio-demographic reasons to adjust their institutions' responses to the learning needs and interests of older adults; agencies with responsibilities concerning the democratisation of educational opportunity across the lines of age, gender,

ethnicity, and social class; professionals working with older adults in agencies such as community day centres and retirement/nursing care homes; and public sector departments which have specific responsibilities towards improving the quality of life of older adults. The work presented herein will also appeal to a wider audience of general readers who are interested in learning especially those working in voluntary and learning agencies where older adults are clearly over-represented.

STRUCTURE OF THE BOOK

This handbook includes three parts and a total of fifteen chapters. Part One of the handbook presents the necessary context for a successful understanding and study of older adult learning. Chapter two, 'Ageing, older adults, and later life', serves as a gerontological overture to many of the themes, plots and characters discussed in further detail in subsequent chapters. It offers a concise introduction to the key characteristics surrounding the study of older adults, especially the impact of demographic changes during the twentieth century on national and international population structures, as well as the social, biological, and psychological components of the ageing process. This chapter also discusses the debate surrounding the 'right' definition of later life and older adults, and provides a brief overview of the social world of older persons. Chapter three, 'From adult education to lifelong learning', argues that there are numerous concepts that have been used and abused in the attempt to understand the fundamental principles of older adult learning/education. In the first instance, we clarify the uses of seemingly simple terms such as 'learning' and 'education'. Next, we traverse the meaning attributed to 'adult education' and the increasing neglect of this term in favour of 'lifelong learning' and 'the learning society'. Hence, as we explain the transition from an adult education to lifelong learning discourse, we also examine critically the technological, economic and cultural changes which have led to the adoption of the phrases 'learning society' and 'lifelong learning'. Chapter four, 'Lifelong learning and the emergence of the learning society', explores the political context underlying the concept of lifelong learning. Lifelong learning policy is discussed at a global, national and local level, given its all pervasive character. The various meanings associated with 'the learning society' are analysed in depth, including whether it is better described as a myth or reality. Moreover, we examine the functions of a learning society suggested by manifold policy discussions: the learning economy (the world of work and older adults place within it), personal fulfilment, active citizenship, and the allied concept of social inclusion. The last chapter in the first part of the handbook, 'History and Development', details the context which made this field the fastest growing sector of lifelong learning, and locates its genealogical development in the post-War American and British contexts which were amongst the first nations to break the association between retirement and frail old age. It argues that whilst it was during the late 1940s and 1950s that the first campaigns in favour of late-life learning took place, it was only in the 1970s that older adult learning was officially recognised as a speciality discipline. This occurred as scholars established 'educational gerontology' as that

area of study and practice arising from the interface of adult education and social gerontology.

Part Two of the handbook includes four chapters that focus on the philosophical, sociological, and psychological issues surrounding older adult learning. Chapter six, 'The psychology of older adult learning', focuses on the psychological interface between learning and late-life development. It discusses the role of intelligence as it explicates the discerning beliefs about ageing and intelligence, to subsequently focus on attention and memory, both of which constitute the basic cognitive processes involved in persons' ability to understand and remember novel information. The cognitive function of language and problem solving, which hold a central role in reasoning and communication, and the psychology of wisdom, which demonstrates how as adults get older they generally turn to the pragmatics of intelligence, will also be addressed. Chapter seven, 'Understanding older adult learners and education: Sociological perspectives', is concerned with developing an analysis of older people engaged in education from a variety of sociological viewpoints. Initially, we focus on reviewing some of the major perspectives from sociology including those informed by a sociology of (adult) education and contemporary renditions of postmodernism. These prevailing theories operate at both macro (broad, societal) and micro (specific, localised) levels and incorporate views which may reinforce dominant hegemonic discourses or on the other hand challenge them. Indeed, one of the enduring themes within a sociology of education is the degree to which structures of learning support or subvert the status quo. This chapter also addresses questions such as to what degree does older adult education (sometimes unwittingly) perpetuate economic-social inequalities with regard to dominant and subordinate groups? and is older adult education mainly a system of social control or is it a mode of social transformation (or perhaps contradictory in its effects)? Chapter eight, 'Rationales for older adult learning', is concerned not with 'whether we can or cannot teach or retrain an older adult' but 'to what end?' and 'why?'. It is therefore a reaction to the relative general absence of a clear idea as why older adults should be educated. Rather than advocating an 'add and stir' approach, whereby age is 'added on' to other analytic premises, this chapter calls for older adult educators to view learners not as simply men and women, but as *older* men and *older* women. This chapter traces and assesses the range of rationales for the inclusion of the post-work population in educational policy decisions which range from functionalist to moral to critical perspectives. Chapter nine, 'Geragogy', highlights that although older adults are not so distinctive so as to merit a special methodology of learning, it remains that they inhabit a bodily, psychic, and social realm that is to some extent different from that experienced by younger adults. Geragogy, as it is employed in this chapter, refers to the need to fine-tune adult learning teaching and instructional styles to enhance the learning experiences of older adults who are generally post-work and post-family, and sometimes, frail and with intellectual limitations. These situations require instructors to become sensitive to the unique characteristics of older learners and tailor their instructional plans accordingly.

The third part of this handbook focuses on the provision and participation of older adult learning. Chapter ten, 'Participation for and barriers to learning', addresses the issues of adult motivation, participation and barriers with respect to older adult learning. It asks what is it that eventually persuades people to engage in learning events? why some people and not others? what does participation mean to adults? and what are the key barriers affecting older adult education? Although these and related questions have been the target of many studies of adults in primarily non-formal and formal contexts, only a few of which have concentrated exclusively on seniors. The focus of this chapter is to answer these questions and discuss the broader issues which impinge upon who gets to education and who does not. Chapter eleven, 'Formal and third-age learning', discusses that part of late-life learning occurring in formal and third age learning avenues. Whilst formal learning refers to activities taking place within the institutionalised and hierarchical educational system, third-age learning consists of activities providing selected types of learning to older adults only. This chapter opens by an overview of the oeuvre of available learning opportunities for older adults. Subsequently, it brings the lens on older persons in higher education, older workers' learning, and pre-retirement planning courses. Finally, it focuses on the most popular providers of third-age learning by examining their characteristics, functions and achievements. Chapter twelve, 'Learning in Non-formal and Informal Contexts', focuses on learning undertaken by older people away from formal institutions. This learning is diverse, multi-purposed and life-wide. First we examine what self-directed learning means for older adults prior to investigating the roles that social institutions play in the lives of seniors. Two case studies illustrate more general observations. The first, which focuses on Age Concern, details how this body is ostensibly a multi-dimensional agency aiming to meet diverse needs of older people. However, it is also an exemplar of how non-educational organisations have a key role in educational processes. The second case-study brings the lens on the family which, as an active institution, is an important source of learning for all adults which we consider. Next we analyse volunteering as a further vehicle for educational opportunity, where we look into how education and citizenship intersect in the interests of older people. Chapter thirteen, 'Learning and Health in Later Life', investigates the relatively ignored area of how these two important aspects of later life overlap. Underlying ideologies of health and ageing are explored. We focus particularly on biological and psychological processes of ageing before looking into policies at multiple levels from the viewpoint of relevance to older people's health. This connection is illustrated through a case study of policy in Aotearoa New Zealand. Given the significance of gender in later life, we consider how men and women negotiate pathways of learning. Drawing upon novel work with regard to men's sheds as collective non-formal learning sites, we demonstrate how men's learning and well-being are interconnected. Chapter fourteen discusses the relatively recent phenomenon of 'Intergenerational learning' - that is, learning initiatives that increase cooperation, interaction, or exchange between any two generations which involve the sharing of skills, knowledge and experiences. This chapter traces the development of intergenerational programmes and their

CHAPTER 1

incursion into the domains of lifelong and older adult learning, presents the dominant rationales for intergenerational learning practices, provides an overview of intergovernmental and national policies on intergenerational learning activities, and finishes by highlighting proposals for good practice in intergenerational learning.

Finally, chapter fifteen brings the handbook to a close by including a concluding piece that ties together the different stands of knowledge presented in previous different chapters.

NOTES

- ¹ As discussed in further detail in chapter two, throughout this handbook the terms ‘older adults’ and ‘older persons’ have a qualitative meaning and refer to people, whatever their chronological age, who are no longer involved in an occupational career or with the major responsibilities for raising a family.

AGEING, OLDER ADULTS, AND LATER LIFE

This chapter sets the background context to the field of older adult learning. It offers a concise introduction to the key characteristics surrounding the study of ageing, older adults, and later life. First, we consider the impact of demographic changes during the twentieth century on the national and international population structures. However, ageing is more than simply a demographic phenomenon, and short overviews of its social, biological, and psychological components are also discussed. The second part discusses the debate surrounding the 'right' definition of later life and older adults. This occurs because physiological manifestations of biological ageing occur at diverse rates in different people. Hence, the potential of using biological markers or some notion of functional age to define later life and older adults is severely limited for both conceptual and technical reasons. The third section provides a brief overview of the social world of older persons. Although the retirement transition is characterised by extensive heterogeneity, it generally includes some loss of paid employment, changing networking dynamics, and some experiences of ageism and age discrimination. Finally, the chapter turns its attention to the fact that for a significant percentage of older persons, later life brings a decline in their independent status. As a result, many make use of a variety of care services - ranging from informal, domiciliary, to residential/nursing - in order to safeguard their quality of life.

AGEING

The second half of the Twentieth Century witnessed unprecedented demographic changes to the extent that this period is referred to as the 'age of ageing'. As a result of declining fertility and mortality levels, all countries throughout the world registered an improvement of life expectancy at birth, and subsequently, a growth in the number and percentages of older adults. Most countries' population structure has therefore evolved out of a traditional pyramidal shape to an even-shaped block distribution of equal numbers at each age cohort except at the top.

Population projections by the United Nations (2010) report that the world's number of people aged 60 years and over is expected to almost triple in the next 40 years (from 737 million to 2 billion) - see table 2.1. In the year 2009, 11 percent of the world's population was 60 years or over, a percentage that adds up to a total of 737 million adults. In the year 2050, it is projected that this figure will rise to 22 percent of the world's population. This means that whilst the global population would have increased from around 6 billion in 2000 to 9 billion in 2050 - a 50 percent increase - the world's older population will increase by 300 percent in the same period. On a regional basis, 22 percent and 18 percent of European and North American populations respectively were aged 60 or over in 2009. Developing

countries will experience the steepest increase of the older population segment. Today, over 60 percent of the aged population are living in developing countries, with this number projected to increase by 75 and 85 percent in the years 2025 and 2050 respectively (Kalache et al., 2005). Some countries such as China, Brazil and Nigeria will double their number of older adults in the coming fifteen years. This is astounding considering that it took Western European countries around hundred years to reach such percentages of older adults (Kinsella, 2001).

Table 2.1. Population aged 60 years and over by continent

<i>Continent</i>	<i>Population aged 60 years or over</i>					
	<i>Number (000s)</i>		<i>Percentage of Total Population</i>		<i>Share of the 80+ Population</i>	
	<i>2009</i>	<i>2050</i>	<i>2009</i>	<i>2050</i>	<i>2009</i>	<i>2050</i>
World	737,275	2,008,244	11	22	14	20
Africa	53,770	212,763	5	11	8	10
Asia	399,881	1,236,103	10	24	11	18
Europe	158,503	236,426	22	34	19	18
Latin America & Caribbean	57,039	186,036	10	26	15	22
North America	62,744	124,671	18	28	21	29
Oceania	5,338	12,246	15	24	19	27

Source: United Nations (2010).

Table 2.2 documents the life expectancy at birth for men and women in selected countries. As a reflection of world-wide trends, all of the countries will experience substantial increases in life expectancy at birth for both sexes. The data also indicate

Table 2.2. Life expectancy at birth for men and women in selected countries

	<i>1975–1980</i>		<i>2000–2005</i>		<i>2025–2030</i>	
	<i>Male</i>	<i>Female</i>	<i>Male</i>	<i>Female</i>	<i>Male</i>	<i>Female</i>
Bangladesh	47	47	61	62	69	72
Brazil	59	64	64	73	70	78
China	64	66	69	73	71	77
France	70	78	75	83	79	85
India	53	52	63	65	67	71
Indonesia	52	54	65	69	71	75
Japan	73	78	78	85	81	90
Mexico	62	69	70	76	74	80
Nigeria	45	47	51	52	58	58
Russian Federation	63	74	61	73	67	75
United States	70	77	74	80	76	82

Source: United Nations (2010).

that the current trend for masculinity ratios (men per 100 women) to decrease with age will be consolidated further in coming decades. This trend is referred to as the 'feminisation of ageing'. An average female life expectancy at birth of some 80 years has become the norm, whereas few countries can boast of the same level for men. Globally, older women comprise 12 percent of the total population aged 60 years and above, compared to 10 percent of males (United Nations, 2010). The masculinity ratio for cohorts aged 60/80 plus stands currently at 83/59 for the world, 85/68 for Africa, 90/68 for Asia, 70/46 for Europe, 82/65 for Latin America and the Caribbean, 80/57 for North America, and 88/62 for Oceania respectively (ibid.).

Apart from being a demographic phenomenon, human ageing also constitutes an ongoing biological, psychological, and social process that is embedded within the dialectical relationship between individual agency and the societal structure. The following paragraphs introduce three key features of human ageing:

Biological ageing. The passage of time for humans is related to a number of physical and biological changes that range from the greying of hair and wrinkling of the skin to a degeneration of one's reproductive capacity, immune system response, and cardiovascular functioning (Morgan & Kunkel, 2001). In the past researchers distinguished between normal age changes and pathological or disease processes that become more prevalent with age but are not caused by ageing. Yet, with the growing knowledge about the modifiability and variability of ageing lives, this distinction has shifted to 'usual', 'optimal', and 'pathological' forms of ageing. Whilst optimal ageing is characterised by a minimal loss of physical function and the maintenance of an active lifestyle, pathological ageing is accompanied by multiple chronic diseases and negative environmental effects. Usual ageing is somewhere in between, when active healthy individuals experience some physical deterioration and chronic issues. Despite the hegemony of the 'biomedicalisation of ageing', which treats ageing as a primarily biological phenomenon, there is evidence that adults vary greatly in their experience of physical ageing. This suggests that few of the significant aspects of ageing are purely or even primarily physical (Kaufman et al., 2004). The relation between health and older adult learning is discussed in chapter 13.

Psychological ageing. The adult years also bring changes in personality, mental functioning, and sense of self. Whilst the memory and intelligence of some individuals improve as they age, others find they are doing worse as they get older (Marsiske et al., 2001). The crucial point here is that such decline or improvement is not simply to changes in the ageing brain but also the result of specific social contexts such as the historical era in which one is born and the contexts in which everyday lives are situated. As regards one's personality - whose function is to reflect our presentations of ourselves to the world - people experience both stability and change as they get older. Ageing individuals tend to adopt more flexible goal adjustments and social comparison referents by which they judge themselves. Yet, we also go to great lengths in preserving important aspects of our self, especially

with respect to those attributes that define and represent who we ‘really’ are. In a nutshell, loss of cognitive functioning and a change in personality, are not inevitable results of ageing. Just as significant loss of function is not universal in later life, so too memory and other cognitive skills may remain stable or even improve with age (Honn Qualls & Abeles, 2000). Psychological issues relating to older adult learning are discussed in chapter 6.

Social ageing. Ageing does not occur in a linear manner, according to scientific rules and maxims, but arises as a multidimensional and dynamic force. People age differently according to the images, words, and behaviours of the world around them. Our ageing experience is tied to the way in which society uses age to assign people into roles, to channel people in and out of positions in the social structure, to allocate resources, and to categorise individuals (Morgan & Kunkel, 2001). Issues of inequality constitute a central preoccupation of the political economy approach. Early work by Townsend (1981, 1986) found that the state forces older persons in a situation of ‘structured dependency’ - that is, forced exclusion from the labour market, to experience passive forms of community care, and social exclusion and poverty (Estes, 2006). Social class is a major concern in this line of research, with political economists taking the view that older people are as deeply divided along class (and other fault lines such as race and gender) as young and middle-aged adults. Another key direction in social ageing is an appreciation of the interplay and ‘recursive’ relationships of culture, structure and agency in shaping ageing lives (Andersson, 2003). The relationship of such issues and older adult learning is discussed in chapter 7.

LATER LIFE

The definitions of ‘later life’ and ‘older adults’ constitute enormous bones of contention. This is because physiological manifestations of biological ageing occur at diverse rates in different people, with the result that members of older cohorts are considerably varied in terms of senescence. As a result, the potential for using biological markers or some notion of functional age is severely limited for theoretical, conceptual and technical reasons (Victor, 2005)

There are, however, a number of alternative possible ways to determine when later life starts and to identify older adults although none is perfect. Most empirical social science hang the onset of later life upon a particular ‘chronological’ or calendar age, such as 60 as in the case of the United Nations or 65 as in the case of the Eurostat. National studies generally take the statutory retirement age as the onset of later life, a figure that is usually between the ages of 60 and 70. Studies of older adults in developing countries, such as in Africa, take note of the lower life expectancies and put the onset of later life as 50 or 55 (WHO, 2010). Although calendar ages are many times taken to signify the onset of ‘old age’ they are, at best, only a rough indication to the ageing of individual in biological terms. As Victor (2005) claims, chronological age has no ‘innate’ meaning but is derived from the social and historical meaning of specific geographical contexts which, of

course, may vary substantially. It is only useful in making sense and ordering large sets of quantifiable data, and as such, it tells researchers nothing about how it feels to be old. Comparing ageing lives by chronological age is futile since not only do people experience the transitions of ageing in different birthdays, but people also define ageing experiences differently. As Bytheway (1990 : 11) asserts, “there is no inner ‘clock’ within the individual’s metabolism that determines either the timing of key ‘events’ or the temporal rate of specific kinds of change”.

Another approach is to treat later life as a distinct phase in the lifecycle and life stage. Although in theory later life arises as a social construction - that is, resulting from public policies, services and markets catering exclusively for the supposed needs of older adults (Guillemard, 2000) - it remains that older adults are not only ‘ageing’ but also ‘older’. In defence of a realist approach towards later life, Andrews asks:

Old people are in fact young people? Really? What happens to all those years they have lived, the things they have learned, the selves they have evolved from and the selves they are becoming? Years are not empty containers: important things happened in that time. Why must these years be trivalized?

Andrews, 1999 : 309

The pervasiveness of ageism in all cultural and geographical domains (Nelson, 2004) provides further backing in favour of a realist approach towards later life. Indeed, if “old age does in fact confer a loss of power, even for those who are advantaged” then how come “discrimination and exclusion based on age - across lines of race, class, and gender - does exist?” (Calasanti, 2003 : 205). As such, a lifecycle approach considers later life to be a broad social category that encompasses changes of role and physical alterations, as well as other forms of transition. In this respect, we propose the following working definition of older adults: *people, whatever their chronological age, who are post-work and post-family, in the sense that they are less or no longer involved in an occupational career or with the major responsibilities for raising a family*. The good thing about this definition is that while it introduces some parameters as who is an older adult and who is not, it does not utilise them in a categorical manner. Although it is true that not everyone experiences all the stages present in the family and occupational life cycles, and that the lifecycle in present times has mutated in a series of smaller segments, adults of a certain advanced age tend to share two key life experiences. First, after reaching a career peak as regards promotions and salaries, older families generally scale down their career expectations in return for retirement with some pension and health benefits, sometimes alongside some part-time work to keep busy and motivated (Czaja & Sharit, 2009). Although traditionally such transitions have been more true for men and citizens living in high/middle-income countries, current literature finds the retirement transition to becoming increasingly prevalent among women and low-income countries (Johnson, 2005). Secondly, despite the current variations in family dynamics, older adults tend to be part of families whose children are moving towards adulthood or have left the family. Hence, parents’ responsibilities for offspring decline substantially in later life (Caro, 2006).

The subjects of 'ageing', 'older adults', and 'later life' are the concern and focus of the multidisciplinary field of gerontology. The study of ageing has taken its name from *geront*, the Greek word for old man (sic). Gerontology, which must be distinguished from geriatrics, focuses on how to prevent or manage the diseases of ageing. It includes all of the following:

- (1) scientific studies of processes associated with aging, (2) scientific studies of mature and aged adults, (3) studies [on ageing] from the perspective of the humanities (e.g., history, philosophy, literature), and (4) applications of knowledge for the benefit of mature and aged adults.

Kastenbaum, 1995 : 416

The beginning of gerontological academic training can be traced to the early 1950s when several gerontologists came together to form the Inter-University Training Programme in Gerontology housed at the University of Michigan, with first degrees in gerontology being established in 1950 and 1955 at the University of Michigan and Duke University respectively (Douglass, 1995). Currently, one finds about 90 courses leading to postgraduate courses in gerontology, 60 in the United States of America and the remaining in as many as 18 different countries. Ten of these courses consist of Doctorate studies (Gutman, 2007). Gerontologists are unanimous in that valid and reliable representations of ageing, older adults, and later life require convergence of both information from a variety of methods and sources, as well as the diverse disciplinary components. As a result, gerontology is developing in two key ways. First, one witnesses the movement of gerontology from a multidisciplinary to an interdisciplinary field that is guided by a conceptual framework that facilitates an appreciation for how gerontological questions relate to age-related topics of inquiry and how different disciplines provide insight into those questions (Wilmoth & Longino, 2007). More studies, even in educational gerontology, are now involving a plurality of disciplines where boundaries are often muted and the joint contributions of the synergy are highlighted. Second, more studies are making use of triangulation in their collection of data, and mixing qualitative and quantitative styles of research (Jamieson & Victor, 2002). Utilising two or more methods is advantageous because it becomes possible to bring out complementary strengths, whilst some methods also have the potential to buffer the limitations of other methods. This is not to say that gerontology's growth as a discipline has not been hindered by limitations. These include especially a lack of critical elements such as unifying theories and excessive preoccupation with health issues (Bengston et al., 2009). Yet, the past decade has witnessed the beginnings of a common gerontological imagination and asserted strongly that gerontology is coming of age as a discipline (Alkema & Alley, 2006; Ferraro, 2007). The emergence of educational gerontology is discussed in chapter five.

THE SOCIAL WORLD OF OLDER ADULTS

Early and modern literature on later life was heavily imbued with the ethos of functionalism (especially disengagement and modernisation theories) where

retirement was equated with a loss of status and role, and hence, social exclusion (Cummin & Henry, 1961). Retirement was viewed as the start of a process of withdrawal from the social world and as being generally disruptive to the social network (Parsons, 1942; Tibbitts, 1954). The literature also depicted retirement as problematic for the individual, and detrimental to one's physical and psychological health. Retirees were depicted as feeling useless, and suffering from a loss of self-esteem and self-respect, so that most treatises on retirement concluded by providing ample recommendations as how individuals can compensate or adjust for such losses. Given the strict association between occupation and social class, ethnographic data also showed retirees striving to maintain a strong identification with their past occupations. This was easier for some occupational affiliations (e.g. professors, employees of multi-national corporations) than others (e.g. unskilled workers, clerks) who felt as if in some limbo position (Atchley, 1976). Moreover, retirement was regarded as a male phenomenon and non-applicable to women. Most literature was conducted from a 'phallogocentric' perspective that considered older women as 'other' to older men, without any emphasis on personal biographies, and focused exclusively on the way older women are disadvantaged and what can be done to ameliorate their lives (Gibson, 1996).

Contemporary studies show clearly that the above characteristics of retirement are too simplistic. The notion of a continuous period of employment from late teenage years to 65, often with a single employer, and with retirement substantiated by the receipt of a public pension at a fixed age, is now unrealistic in the face of a globalised, diverse working world. In recent years, most post-industrial countries experienced positive upturns in economic activity amongst older persons (Künemund & Kolland, 2007). This occurred as national governments restricted policies encouraging early retirement, developed learning programmes that trained and re-skilled older persons, supported gradual pathways to retirement, and introduced work incentives in pension schemes. As a result, the life course that people now follow before they define themselves, or are defined by others, as retired has become increasingly complex and blurred. As Phillipson (1993) argues, the transition into retirement can include some or all of the following: labour market factors such as forced and voluntary early retirement, redundancy (voluntary or compulsory), labour supply issues (unemployment), and personal factors (ill health, caring responsibilities). Such changes indicate that the adult and later years are not primarily characterised by the retirement transition but by a diverse engagement with civil society that can be summarised as follows: *citizenship transitions* constructed around closer involvement with family, friends and community based networks, *consumer and leisure transitions* constructed around the development of more individualised lifestyles, and *work transitions* constructed around new types of engagement with paid work (ibid.).

Social network dynamics do not necessarily become less forceful in retirement. Although it is understandable that with the end of work one's 'bridging' social capital (weaker but more cross-cutting ties with resourceful individuals useful for 'getting ahead') tend to decrease, retirees can still tap onto their 'bonding' social capital (strong bonds with family members that are good for 'getting by'). At the

same time, retirees always have the opportunity to engage in more activities and enrol themselves in organisations to increase their pool of acquaintances and friends. Older persons are placed in a lifespan developmental convoy of social networks and support, where each person moves through life surrounded by a convoy of people to whom s/he is related through the exchange of support (Antonucci & Akiyama, 1987). The convoy may be conceived as three concentric circles, representing different levels of closeness. Whilst the closer relationships are determined more by emotional attachment (usually family), the relationships in the outer circles are determined most by role requirements (such as with co-workers) (Antonucci, 2001). Whilst research acknowledges that with retirement role-centred networking does decline, data suggest that the total network size remains equal (van Tilburg, 2003). Even the recently widowed appear to focus on their closest relationship and make new friends after a few years, and thus, respond to changes in needs. Moreover, older persons increasingly engage in volunteering activities to improve their social networking, as well as meeting the full obligations of grandparenthood to solidify further their familial relationships (Falk & Falk, 2002; Hank & Erlinghagen, 2009).

The association between retirement and loss of status, role, and self-identity is also problematic. In post-industrial and consumer societies, employment is not the only means of achieving social worth (Fairhurst, 2003). Rather, personal and social identities are expressed by ways of life that are shaped by the consumer society and other numerous activities aside from work. On the basis that societies have experienced a transition from an organised and class-oriented organisation of life, towards more individual and more 'private' lifestyles, Gilleard and Higgs (2000) argue that younger and older people share the same possibilities of expressing themselves by way of respective patterns of consumption. In this view, the change from gainful employment to retirement loses much of its significance, as patterns of consumption become more decisive for one's own identity than paid work. Older persons are now experiencing unprecedented opportunities to engage in identity-work as societies place more emphasis on human agency and "self-government that emphasises personal entitlements linked to personal responsibilities" (ibid. : 7). Later life, it is argued, has latched upon the consumer revolution to transform itself into a 'cultural field' in which actors face a multiplicity of choices, opportunities, and futures. Older persons are, within some limits, living their life as they please before being overtaken by physical frailty. Retirement is thus being underpinned by the post-war transformations in the nature of global capitalism, in cumulative improvements at all ages, and in health, wealth, and happiness (Gilleard & Higgs, 2005).

Although studies demonstrate clearly that it is the consumption of the products of mass culture and the exposure to mass media that most distinguishes the identities and life-styles of contemporary older persons (Jones et al., 2008), it remains important to emphasise that not all older persons can equally participate in such endeavours. Despite the positive outlooks of some researchers on the agentic potential of later life, it remains that the quality of life of many older persons remains limited and deprived due to social exclusion and class inequalities.

Focusing on deprived neighbourhoods, Scharf and colleagues (Scharf et al., 2005; Smith et al., 2004) found ample evidence of social exclusion amongst older persons who were excluded from basic services, material resources, civic activities, social relations and other aspects of the wider-neighbourhood. Moreover, despite claims to the contrary by post-modern gerontologists, class inequalities remain a crucial factor in influencing how people experience later life and, in particular, the quality of lives they lead (Walker & Foster, 2006; Formosa, 2009). Ethnicities constitute another major area characterised by clear and marked inequalities. For instance, Nazroo's (2006, 2008) research reports that ethnic minorities in Britain (especially Bangladeshi and Pakistani men) hold high levels of bad health and diabetes, as well as low income and asset rates. The origins of such disadvantage lie in their post-migration experiences, with employment opportunities on the whole restricted to jobs with poorer pay and benefits. Such studies underline the presence of socially excluded older persons even in relatively affluent countries, persons who suffer from restricted income, poor health, and a lack of social ties, resulting from a life history of relative disadvantage (Peace et al., 2007).

The social world of older persons is also limited by three other factors - namely, ageism, age discrimination, and elder abuse. The late Robert Butler (2006 : 41), who coined the term, defines ageism as a "process of systematic stereotyping and discrimination against people because they are old, just as racism and sexism accomplish this for skin color and gender". Ageism, which is deeply ingrained in social relations, arises from the younger generations' attempts to cease to identify with older persons as means to reduce their own sense of fear and dread of growing old. Ageism manifests itself in everyday life through a variety of myths and misconceptions such as that ageing results in a lack of productivity, disengagement, inflexibility, senility and loss of sexuality. Age discrimination is a human rights violation - that is exhibited in various social domains ranging from employment, health care, the media, and even education - as a result of which older adults are denied opportunities and resources on account of their age (Bytheway, 2005). Practical examples include when agencies make insurance available only to persons below a certain age and when older persons are rejected from newscaster roles and advertising models because they are too old rather than because they are not qualified. Finally, elder abuse refers to "a single or repeated act or lack of appropriate action occurring within a relationship where there is an expectation of trust, which causes harm or distress to an older person" (Action on Elder Abuse, quoted in Daichman, 2005 : 325-6). Elder abuse can be intentional or unintentional and of one or more types: physical, psychological, financial, sexual, and neglectful. Whilst all persons are susceptible to abuse, older persons are especially vulnerable due to the fact that with increasing age people tend to experience a decline in their financial, cultural and social resources.

On a final note, it must be emphasised that recent research on ageing women has prompted the reconsideration of several elements found in conventional literature (Bernard et al., 2000; Cruikshank, 2003). Although 'women's work' may appear to be somewhat disposable and insignificant, it is considered by many older women to be very important, both financially and in terms of their self-identity as workers.

Moreover, women's lives do not fit easily into 'phallogocentric' life course models that propose that retirement was the end of an adult's economically and socially productive life. This is because for older women retirement is only one facet of their dynamic life, the others being domestic tasks and caring responsibilities (Arber et al., 2003). Older women's views on later life may be encapsulated as a mixture of hopes and fears. On one hand, they tend to perceive retirement in positive terms, as an opportunity to renew their relationships, as bringing a more comfortable liberty to enjoy travel, relaxation and socialisation. On the other hand, later life can be anticipated with some anxiety as ageing women dread widowhood, isolation and poverty - as well as for bringing with it negative changes to one's identity and self-image, physical appearance, and one's ability to exercise control over oneself and one's surroundings. However, it remains that older women constitute a heterogeneous group so that all members are not equally disadvantaged. There are rising inequalities among women according to education and social class, and especially, according to whether they have children (Arber, 2006; Price & Ginn, 2006). Childless women with good education and a reasonable position in the occupational structure will accumulate good value pensions in most societies. For women with children, however, class and educational advantages are much less striking, with all mothers severely disadvantaged in paid work and pension accumulation (Warren, 2003).

CARE PROVISION FOR OLDER ADULTS

A key experience of ageing is shaped and contextualised by health resources. As people grow older, many actors tend to experience a decline in their capacity to remain independent. Some will require a number of social and health care services in order to continue living in the community. Others experience more grievous health issues and may have to enter either residential or nursing care. As a result, later life is intimately interrelated with policies providing care for older people. There are three key parameters as regards care in later life - namely, informal care-giving, domiciliary care, and residential and nursing care.

Informal care-giving is the provision of care by a family member or other individual for a person who has become dependent due to the effects of chronic illness or some other physical ailment. A study by the National Alliance for Caregiving and the American Association of Retired People (2004) estimated that there are currently over 44 million informal caregivers aged 18 years and older in the United States. Hence, as much as one-fifth of all US households are providing care to someone aged 50 years or older. Informal care-giving is provided mostly by family members, especially women as the same study reports that over three-fifths (61 percent) of all care-givers are female (*ibid.*). Informal care-giving requires a significant expenditure of time and energy over extended periods of time, involves tasks that may be unpleasant or uncomfortable, is likely to be non-symmetrical, and is a role that might not have been anticipated by the caregiver. Informal care-giving varies by type and stage of illness, and includes both direct and indirect activities. The former includes the provision of personal care such as bathing,

grooming, dressing, or toileting, and health care tasks such as catheter care, giving injections, or monitoring medications. Indirect tasks include care management, such as locating services, coordinating service use, monitoring services or advocacy, and household tasks such as cooking, cleaning, shopping, money management, and transportation of family members to medical appointments and day-care programmes (Honn Qualls & Zarit, 2009). The intensity with which some or all these care-giving activities are performed varies widely. Whilst some care-giving has only limited types of involvement for a few hours per week, others might provide more than 40 hours per week or even twenty-four hours a day.

Domiciliary services are a type of provision that is provided either at the home of older persons or in the community where they reside (Cox, 2005). Domiciliary care can be considered as an approach rather than a specific service in that it covers both social and health care needs. Home- and community-based services assist functionally impaired older persons with their activities of daily living and household management. Whilst health-care services provide assistance with medications, wounds, specific therapies and activities of daily living, social-care services focus on household tasks, help with grooming, and physical care. Whereas the former services are provided by nurses, the latter are provided by health aides under the supervision of a social service agency. The following are the most prevalent types of domiciliary services:

Home-help. The expectations of the public in what it considers to be ‘home care services’ are insatiable. However, services provided under this scheme generally consist of some or all the following: bathing, shaving and toileting; helping patient out of bed and to get dressed; bed making; walking and other exercises; tidying up and other light domestic work; shopping; preparation and giving of simple meals; taking prescription to chemist; drugs distribution at patient’s home; and preparation of laundry bundle. Periodical house cleaning (e.g. every fortnight) and laundry service may also be offered.

Home-delivered meals. The use of medications, inability to shop for food, low income, and difficulty preparing food, place persons at risk of poor nutrition and increased severity of disability. This service is to support older persons still living in their own home but who are unable to prepare a nutritious meal.

Senior centres. Senior centres play a major role in the network of community-based services. They focus on socialisation activities for older adults who may function well but who might experience the loneliness and isolation that frequently accompanies the ageing process. Some centres also provide services for functionally impaired older adults.

Telephone reassurance. This support programme provides emotional and practical support to frail elders living in the community, especially those who are widowed and either childless or lost contact with their children. Older adults are telephoned at least once daily, and if there is no answer, the caller telephones the specified relatives or friends, and in the absence of these individuals, the police.

Respite care. Respite care provides relief to caregivers and is a key supportive service generally offered either in the elder's residence or in a nursing care setting in the community. As such it may range from a few hours a day for a limited number of time to 24 hour care for consecutive days. Respite care provides caregivers with the opportunity to attend to career responsibilities, as well as having a substantive period of relief from the intensive rigours of care-giving.

When older adults experience physical and cognitive impairments so severe that their abilities to function and remain independent suffer greatly, they generally decide to enter residential or nursing care. The motivating factors to move out of their homes are generally impairments in the instrumental activities of daily living and the absence of either a spouse or close relative to assist them (Stone, 2006). There are various types of residential/nursing care for older persons. *Retirement communities* consist of apartment houses, complexes and even neighbourhoods in which a majority of the persons are over the age of 60. These communities offer the feature of adjusting the environment to the needs of the older person and typically provide personal care, social and recreational services, and congregate meals. The continuum of on-site services related to the functional status of the older person means that residents are not at risk of eviction if they become impaired or their impairment worsens. *Assistant living* centres meet the needs of very impaired people but in contrast to nursing homes the care is provided in more homelike settings, usually with persons having their own or shared apartment. The goal of assisted living is to assure residents of choice, dignity, independence, and autonomy. Although the majority of assistant living centres would admit elders who require assistance moving from a bed or chair, few allow or retain persons with moderate cognitive impairment. Most facilities have a registered nurse on staff and all tend to offer twenty-four hour oversight, housekeeping, two meals a day, and personal assistance. *Residential care* caters for physically frail older persons not owning nursing and health care needs. It provides accommodation, meals and personal care such as washing, dressing, toileting and help getting up from bed and chairs. Community nurses carry out any nursing tasks. On the other hand, *nursing care* is provided to older persons who are dependent on others for all or most of the instrumental activities of daily life, and whose levels of disability and dependence require extensive twenty-four hour paramedical monitoring and attention. All nursing homes have nurses present all times, are visited daily by doctors and sometimes geriatricians, and tend to offer paramedical services such as physiotherapy, occupational therapy, social work, and podiatry.

CODA

The goal of this chapter consisted in situating older adult learning in a social context. The practice of older adult learning arises and occurs in specific collective and individualistic milieux. This chapter did not dwell on the relationship between ageing, older adults, and later life on one hand, and older adult learning on the

other, precisely because this is the specific focus of the next thirteen chapters. However, a close reading of the sections in this chapter renders the contours and potential of older adult learning very clear. First, the projected increases in the worldwide population of older adult learning implies that the coming years will witness a rising demand for learning opportunities by older persons in all the informal, formal, and non-formal sectors. Older persons will also become more visible in educational sectors that are traditionally dominated by younger adults such as vocational and higher education, and graduate and post-graduate study. The declining masculinity ratio with age means that while women will dominate opportunities for older adult learning providers must remain sensitive to the needs and interests of older men. Second, the fact that ageing of population is not simply a demographic event but occurs also within psychological and social parameters, means that planners and organisers must remain sensitive to the heterogeneous aspects of later life. There is no 'one size fits all' in older adult learning and activities must be sensitive to the different psychological traits and unequal volumes of social, economic, and cultural capital that typify the older cohorts. Another central concept in older adult learning is 'generation' as young-old and old-old persons will harbour, due to different life histories, different perceptions of and expectations from the learning experience. Finally, the probability of decline of physical capital as people age means that a key role for older adult learning is health literacy, and social empowerment in residential and care settings. Health literacy refers to the degree to which individuals have the capacity to obtain, process, and understand basic health information and services needed to make appropriate health decisions. The entry of older persons in residential and nursing care homes must not be allowed to function as a barrier to learning. Apart that learning is a human right to all irrespective of disability, studies show how older adult learning in care settings promotes residents' health and well-being.