# EDUCATION & OLDER ADULTS:

# DISCOURSES, IDEOLOGIES & POLICIES FROM THE 1980s TO 2001

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## Abstract

The aim of this paper is to describe and critique key policies and policy documents relevant to older adults' learning and education from the 1980s to 2001. It describes relevant aspects of the historical struggles between competing discourses and ideologies which took place during the period. It then examines the impact of these struggles on the policies and main policy documents concerned.

The paper forms part of a larger project which draws on a wide range of sources and extends the analysis back to the 1970s and forward to the present day. This paper, however, draws mainly on a number of government reports. These include the reports of the Working Party on Ageing and Edcuation (1987), the Royal Commission of Social Policy (1987), the establishment of the position of Minister of Senior Citiozens and the Senior Citizens' Unit (1990), the report of the Prime Ministerial Task Force on Positive Ageing (1997) and the International Year of Older Persons (1999).

The paper concludes by describing the development in 2000 and 2001 of the New Zealand Positive Ageing Strategy and raising questions about its implications for education and older adults.

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# DISCOURSES, IDEOLOGIES & POLICIES FROM THE 1980s TO 2001[1]

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## Introduction and background

The aim of this paper is to describe and critique key policies and policy documents relevant to older adults' learning and education from the 1980s to 2001. It engages in a critique of these policies and documents in the light of the ongoing struggles between competing discourses and ideologies.

The paper forms part of a larger project which draws on a wide range of sources and extends the analysis back to the 1970s and forward to the present day. This paper, however, draws mainly on a number of government reports. These include the reports of the Working Party on Ageing and Edcuation (1987), the Royal Commission of Social Policy (1987) and the Prime Ministerial Task Force on Positive Ageing (1997). It also draws on the report by the Senior Citizens' Unit on the International Year of Older Persons (1999) and various other official papers including a number of Ministerial Briefing Papers prepared by the Senior Citizens' Unit/Office as well as a number of secondary sources.

It is important to note at the outset that the definition of 'older adults' is and must remain problematic. Although chronological age may be a significant factor influencing people's lives, learning experiences and perspectives, and in providing a marker of common historical experiences of successive cohorts, it is not a factor which determines people's work, welfare or health status or their learning interests or capacities (Withnall, 1997). Class, gender, race, ethnicity and prior experiences of paid and unpaid work, leisure and education are other factors likely to exert at least as much influence on the lives and learning interests of older adults as that of chronolological age (Tobias, 1998). As was pointed out by the Social Advisory Council in 1984 'The most significant single characteristic of older people is not their age but their diversity' (I. Williams et al., 1984 p. 19).

Learning by older adults can therefore only be understood in the context of the very much wider field of adult education and lifelong learning. Nevertheless this paper does discuss policies and policy papers which are designed to address issues of concern to older adults.

The history of policy development during the period for the 1970s to the early 2000s may best be understood by setting it in the context of the historical struggles between competing discourses and ideologies which took place during the period (For a discussion of 'discourse' and 'ideology' as used in this paper see Foley, 1999 pp. 14-17).

These discourses and ideologies included:

- social democratic discourses and ideologies, linked here with various progressive, socialist, feminist, indegenous and anti-colonial ideologies;
- various forms of conservative discourse and ideology including populist and pragmatic conservatism; and
- neoliberal discourses and ideologies which have challenged the welfare state compromise which had been negotiated between capital and labour in the mid-20th Century.

Social democratic and other similar discourses and ideologies have historically emphasised the social nature of human beings. Their capacities, interests and understandings have been seen as largely socially and historically produced or constructed, and hence are open to change or re-construction. They have endorsed individuality and 'personhood', whilst rejecting ideologies of individualism (Lukes, 1973; R. Williams, 1983), since these have assumed that there are certain fixed or 'given' psychological features (whether these are called instincts, faculties, needs, rights, etc.) which define or constitute human nature, independently of social conditions and hence determine appropriate social policies. Within social democratic discourses, the state through democratically elected governments has been expected to perform a number of vital functions. These have included maintaining and developing public ownership and control of assets and resources considered critical to the collective economic, social and cultural wellbeing, providing education, health and welfare services and mitigating the ill-effects of capitalism. These discourses have not necessarily or invariably rejected outright capitalism and private ownership; nor have they necessarily shared a common political agenda. They have however allowed for and supported a range of progressive policies and programmes which involve using the instruments and resouces of the state to achieve collective ends.

Within these discourses in recent times the state has been seen as having a key role to play in providing, promoting and supporting:

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- learning opportunities for people of all ages including older and younger adults, and including a wide range of adult and community education (ACE) programmes;

- projects and programmes to challenge inequitable structures and practices including those which stereotype, exclude or marginalise older and younger women and men from working class or poorer backgrounds as well as Mäori and Pakeha and people from other cultural and linguistic backgrounds; and

- a wide range of positive ageing strategies, projects and programmes.

By way of contrast, both conservative and neoliberal discourses and ideologies have been profoundly sceptical about the possibility of positive change or reform arising from state intervention. Both have espoused a minimalist state and have had reservations concerning the welfare state, and both have endorsed various ideologies of individualism. In spite of this, within democratic states such as New Zealand, pragmatic and populist conservatives have accommodated themselves to the need to mobilise people as individuals, rather than as members of a class or other collective movements. To achieve this they have responded politically with programmes designed to appeal to the majority of individuals. With the increase in recent years in the number and proportion of older people, pragmatic and populist conservatism has responded by designing programmes to appeal to this rising constituency. On the other hand, in view of the fact that few ACE programmes have been designed for mass consumption, these programmes have not received much active support within these discourses.

Within neoliberal discourses and ideologies there has been even less support for involvement by the state in providing, supporting and promoting ACE programmes in general and programmes for older adults in particular. Neoliberalism holds that in an imperfect world of scarce resources in which individuals generally act opportunistically and out of material self-interest, and in which it is difficult if not impossible to gain the full knowledge necessary to engage in cooperative rational planning, the institution that is best suited to securing the interests of individuals is the market-place. As we have seen, neoliberalism deeply distrusts the state and its capacity to do much more than secure the conditions under which the market may operate with equity and efficiency and protect individual liberties and property rights. Neoliberalism, then, is ultimately distrustful of collective political action and of democracy since it may bring about 'distortions' of the market. It emphasises individual choice, and views the welfare state as a negative force that intrudes too much in the lives of its citizens, stifling initiative, inhibiting choice, and fostering drab uniformity. The educational language of neoliberalism is drawn from

economics and assumes that problems of educational policy are primarily technical and managerial rather than political, and hence should be solved by technical means or else left to market forces.

These, then, are the three main discourses and ideologies which struggled for dominance in New Zealand in the 1980s and 1990s. This paper describes aspects of these struggles with special reference to their impact on policies and policy documents relevant to education and older adults.

**Policy discourses of the 1980s**

The 1970s have been seen by many writers (e.g. Boshier, 1979; Dakin, 1988) as a golden age of adult and community education (ACE) in Aotearoa. Among other things the period saw the beginnings of a modern movement to promote age-inclusive lifelong learning policies. By the early 1980s however changes were taking place which brought a halt to the progressive movements of the 1970s.

As in many other capitalist countries, from the mid-1970s Aotearoa New Zealand experienced an increasing crisis of capital accumulation and a growth in unemployment. A populist National government borrowed heavily, instituted a wage/price freeze and cut back on educational expenditure. Under a conservative Minister of Education, these cuts, which were particularly severe in their effects on several organisations such as the WEAs and the National Council of Adult Education (NCAE) which were active in promoting a broad notion of lifelong education, brought to a premature end the progressive, social democratic era (Dakin, 1988).

Despite the predominance of conservative voices in the National government of the early-1980s, liberal views on provisions for older adults were not silenced. In 1982 the New Zealand government took an active part in the UN's first World Assembly on Ageing. Following the Assembly, the Social Advisory Council, a quasi-government organisation, undertook further investigations of the issues raised, and in February 1984 it published a report which looked at some of the implications for New Zealand society of an ageing population. This report stressed the importance of changing public attitudes to ageing, developing a more positive social role for older people, and enhancing their opportunities for learning and recreation. Among other things the Social Advisory Council recommended that the Ministers of Health and Education should ask the NCAE '… to encourage

informed public discussion of attitudes to later life, taking the initiative to promote this concern through existing education networks' (I. Williams et al., 1984 p. 22).

Accordingly in June 1984 the NCAE responded by establishing a Working Party on Ageing and Education. Its aims were to promote appropriate learning opportunities for older people, to encourage all New Zealanders to adopt a positive attitude towards ageing and older people, to promote recognition of the contribution older people can and do make, and to promote appropriate training for professionals, volunteers and relatives who work with and care for older people.

Barely a month later, in July 1984, following a snap election, the fourth Labour government was elected to office. It brought with it the great expectations of many progressive educators of a return to the era of the 1970s. Within weeks of taking office the Minister of Education had approved a NCAE proposal to establish a Lifelong Learning Task Force, and in March 1985 the Minister also asked the Department of Education to convene a series of meetings to examine a number of issues. The focus of both the Task Force and the working conferences was on equity issues, and both reports advocated a number of important changes to strengthen the ACE sector.

Between 1984 and 1986 the government also appointed a number of other groups which were significant for the future of lifelong learning and particularly for ACE. The reports of the working party on trade union education in particular did much to promote social democratic lifelong learning discourses at the time. In addition to making a strong case for a public commitment to trade union education, it also drew on other discourses to argue that individuals should have a right to lifelong learning to enable them to play a full, active and democratic role in all spheres of economic, political, social and cultural life.

Linked with the work of some of these groups, were several important initiatives. These included the restoration of some state funding to WEAs and other organisations, the recognition of paid educational leave for trades unionists, the setting up of the Trade Union Education Authority, the provision of some equity funding in tertiary institutions, and some responses by the state to the pressures from iwi and a variety of other Mäori organisations for recognition of their rights under the Treaty of Waitangi. Few of these reports and initiatives were explicitly focused on the education of older people. Nevertheless taken as a whole they did

provide a framework within which new initiatives and programmes for and by older people could be expected to emerge (Tobias, 2000).

In spite of this, the high expectations of progressive educators in 1984 were never realised. There were a number of reasons for this (Tobias, 1990). However the most important of these relate to the rise to political dominance of neoliberal ideologues. Led by Roger Douglas and Treasury officials they argued strongly for lower levels of taxation, a substantial reduction in the role of the state in the provision of education, health and other social services, and much greater reliance on the market place and on market signals to determine policy and programme priorities. As we saw earlier, these ideologies contrasted sharply with those traditionally associated with the labour movement. Accordingly, their rise to power led to considerable tensions within the Labour government as well as more widely, and had a considerable impact on all aspects of social and educational policy (Jesson, Ryan, & Spoonley, 1988; Kelsey, 1997).

**The Working Party on Ageing and Education, 1984-7**

In the meantime, between 1984 and 1987, the Working Party on Ageing and Education continued with its work, even after the NCAE itself had gone into recess early in 1987. It conducted surveys and seminars around the country and produced a number of reports, occasional papers and promotional materials. It was supported by special grants from the Ministers of Education, Health and Social Welfare as well as from the Lottery Board. It was not until October 1987 that the Working Party produced its final report.

In its relatively brief final report (Ageing and Education Working Party, 1987) the Working Party identified seven priorities which it considered would strengthen the gains made in changing attitudes, in promoting recognition of the contribution of older people and in identifying learning opportunities for older people. Firstly, with regard to policy, it advocated greater recognition by those involved in policy-making, nationally and locally and within schools, polytechnics, universities, non-formal groups and other bodies of the need for: (a) resources to provide more learning opportuinities for older people; (b) more opportunities for education about ageing and the ageing process; and (c) greater participation by older people in the processes of educational policy-making. Secondly, regarding co-ordination and information, the Working Party recommended that funding should be provided to appoint co-ordinators to liaise with groups and provide information about learning opportunities and recreational activities for older people.

Thirdly, with regard to professional training, the Working Party drew attention to the fact that many of those who work with older people (including such people as doctors, social workers, nurses and adult educators) 'too often display prejudices and attitudes that are condescending'. In view of this it recommended that 'those responsible for training these professionals should review curricula to ensure that stereotypes and myths about older people are vigorously challenged' (p 19).

Fourthly, with regard to those who care for the elderly, the Working Party drew attention to the likely rapid rise in the number of people over 80 years of age living at home, who will need support and care from family and friends. The working party stated that these carers 'carry a responsibility which is too often ignored and unsupported'. It claimed that 'there is an immediate need for the education of at-home carers' and suggested that one effective way of reaching these people was by using radio. This could be backed up with appropriate printed and audiovisual material which could be freely available. The Working Party also stated that its survey of the training of carers had shown the need for recognised tertiary training for carers in the commenrcial sector.

Fifthly, the Working Party addressed the issue of pre-retirement education. It claimed that pre-retirement education was virtually non-existent in New Zealand and that the little which was available was usually unsatisfactory. It recommended that:

> 'A comprehensive and long-term approach to pre-retirement education is essential. Employers, unions and educational institutions should take up the challenge. Preparation for one's older active life is important both for men and for women. The development of positive attitudes to one's ageing at this point in one's life span is part of personal growth. This needs to be recognised so that education can serve older people better' (p. 23).

Sixthly, the Working Party focused on 'changing attitudes'. It pointed to the prevalence in society of negative attitudes and stereotypes about ageing and older people but argued that there were signs of change. To reinforce and support these changes it suggested a good deal could be done. For children and young people it suggested that school syllabuses and curricula need to be monitored and where necessary changed to incorporate positive views about ageing. For the public it also suggested a constant monitoring of the media to identify and protest against instances of 'ageism'. It suggested that 'agencies such as Age Concern, the Retired Persons Association, and Sixties Up could take up this task more vigorously and be involved in the (consequential) lifelong learning opportunities that develop' (p. 25). Seventhly, the Working Party highlighted the lack of in-depth

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research about older people in New Zealand, a gap in information and research which needed to be filled especially in view of the need to develop policies in the face of the growing numbers of older people in the population as a whole. It suggested that a comprehensive data-base and clearinghouse for information and research on older people needs to be established.

In the light of all this the working party concluded by highlighting four concrete proposals:

- Firstly it placed priority on the development of a scheme involving the appointment of three community education co-ordinators whose tasks it would be to co-ordinate and promote learning opportunities for older people. They would work under the guidance of local groups but would be paid by the Department of Education.

- Secondly, to promote more learning opportunities for older adults, it proposed that a small fund should be set up to provide seeding money for new projects offering such opportunites.

- Thirdly it proposed that the work of the working party should continue for a further three years, with one of its main objectives being to oversee the projects referred to above.

- Fourthly, the working party stated its belief that it was 'important that the Department of Education initiate discussions with the Department of Mäori Affairs and tribal authorities to ensure that adequate resources are available to support the invaluable non-formal educational role of kaumatua and kuia, particularly to recognise their knowledge in its oral and aesthetic forms, so that the taonga of Taha Mäori is preserved' (p. 31).

The report of the working party, which is the most comprensive report on education and older adults produced over the period, does not claim to advance a coherent set of principles or social philosophy. Nevertheless, it does asssume the continuation of the welfare state and argues strongly that the state should provide the necessary leadership and further resouces to promote and support a number of developments in education about ageing and older people and in providing education programmes for older adults. In doing this it necessarily draws on social democratic discourses and progressive ideologies.

**The Royal Commission on Social Policy, 1986-7**

In March 1986 the Prime Minister announced the establishment of a Royal Commission on Social Policy. This was done partly to counter the increasingly dominant neoliberal discourses referred to above. The Commission's terms of

reference were broad. It was required to look into all aspects of social and economic policy and practice, and among other things to: 'inquire into, investigate and report on the extent to which New Zealand meets the standards of a fair society and the main reasons why New Zealand falls short of any of these standards'(p. v). Among the 'standards of a fair society' to which the Commission was required to have regard were those which secured the

> 'dignity and self-determination for individuals, families and communities; maintenance of a standard of living sufficient to ensure that everybody can participate in and have a sense of belonging to the community; genuine opportunity for all people, of whatever age, race. gender, social and economic position or abilities to develop their own potential; a fair distribution of the wealth and resources of New Zealand .. (and) acceptance of the identity and cultures of different peoples within the community, and understanding and respect for cutural diversity' (p. vi).

The Commission drew on a number of submissions and public hearings on issues concerning older people. It also included in its report a review of relevant demographic changes (Department of Statistics, 1988), a paper on income maintenance, taxation and older people (Royal Commission on Social Policy, 1988) and a substantial paper by Peggy Koopman-Boyden entitled 'Perspectives on the elderly in New Zealand' (Koopman-Boyden, 1988). This paper provided a comprehensive review of submissions made to the Commission and the findings of research as they related to older people.

The Commission endorsed much of what was proposed by Koopman-Boyden. She drew attention to a number of different perspectives and suggested that policy should move away from those in which the medical needs of some old people dominated thinking about and policy for all older people, as well as those emphasising institutional and dependency perspectives on the elderly. Instead she argued that we should embrace perspectives which focused on the integration of older people, the continuity of human lives, health promotion, community care, education, participation and the creation of positive roles and involvement in decision-making. In her paper she also drew on the work of the Ageing and Education Working Party. The Commission endorsed these views and emphasised the links between the views and understandings of the ageing process and of older people and the policies which these views were likely to produce. Hence the Commission emphasised the need to change the attitudes and understandings of many older people themselves, as well as those who cared

for them and the wider public – a set of educational tasks which had been identified by the Ageing and Education Working Party and in other submissions.

Koopman-Boyden advocated that a national policy on ageing should be developed. She identified three objectives of such a policy - the need to: respect and recognise older people and their contribution to society; support and enhance their capabilities and contributions; and provide appropriate care for 'those whose physical, mental and social reserve has been greatly diminished' (p. 700). She drew attention to the fact that underlying these objectives was a view of '… the elderly as having an ongoing productive role in society (objective a), as requiring affirmative strategies to maintain such a societal contribution and their own independence (objective b), and as needing adequate care when such independence is no longer possible (objective c)' (pp. 700-701). To facilitate the development and implementation of this policy she set out three sets of administative strategies. These involved strategies to maintain the continuity of older people's lives and their integration into the wider society, to promote their 'life-enhancement, and the provision of care. In addition to providing some detail on these strategies she also made a number of other recommendations. These included the need for further research and greater regional collaboration among those serving older people.

Overall, these and other recommendations of the Royal Commission rejected market-driven neoliberal positions and instead were located within social democratic discourses and assumed that the state should play an important role in promoting and supporting  social and educational programmes including those for older adults.

**Other policy developments, 1987-90**

From 1987 a number of other review and policy groups in education and social policy presented their reports. They included reviews of nonformal adult and community education, schools, polytechnics and universities. However, the reform process, initiated in a wave of progressive enthusiasm in 1984, had largely been captured by dominant neoliberal discourses. Each review or policy group and each cabinet decision constituted a moment in the struggle between the forces of neoliberalism and those of progressivism. As in many other countries, this resulted in many instances in the rise of a new managerialism, instrumentalism, vocationalism and credentialism (Marshall, 1997; Tobias, 1999). Moreover, the implementation of policies in line with the new ideologies and discourses served

to distance the provision of education from the learning interests of most older adults from working-class backgrounds.

In 1990 an Education Amendment Act was passed by parliament following a lengthy period of public consultation. This Act embodied the fruits of the struggles referred to above, and established the framework upon which tertiary education was to develop over the following dozen years or so. Tertiary education was to be driven primarily by student enrolments and institutional decisions based on potential student enrolments – essentially a market-based, competitive model. There was to be little to distinguish or differentiate between the various types of institutions at least in terms of funding, and each institution was to be largely autonomous within the confines of charters and corporate plans negotiated with the Ministry of Education. The Act provided minimal incentives and opportunities for collaborative planning between institutions and few opportunities for the state to play a significant role in setting priorities. Moreover the Act failed to provide a satisfactory mechanism for the recognition and funding of voluntary organisations engaged in ACE.

The Act endorsed a highly individualised, credentialist and consumerist notion of lifelong learning, and a managerialist and market-oriented approach to leadership and curriculum development. Although notions of academic freedom within universities were endorsed, little space existed for radical or critical adult educational engagements based on the collective interests of groups and movements in society (Crowther, Martin, & Shaw, 1999; Foley, 1999; Thompson, 1997). Moreover little attention was given to securing the interests individuals and groups, including most older adults, who might be expected to look outside the qualifications framework for their learning and education.

In the meantime, in relation to policies concerning older people, in 1987 the government had decided to impose a surcharge on some superannuation payments. This had generated sustained opposition. In the light of this and in view of the recommendations of the Royal Commission on Social Policy, in 1990 the government decided to establish a new post of Minister for Senior Citizens. It stated that 'the primary role of the new Minister will be determining policy relating to GRI (Government Retirement Income), and ensuring specific input from the perspective of senior citizens in other relevant policy areas … As New Zealand's population 'ages' the Minister will play a key role representing the interests of senior citizens at the highest level of Government' (New Zealand Government,

1990b p. 7). It argued further that this new portfolio 'highlights the importance the government attaches to the needs and concerns of senior citizens (New Zealand Government, 1990a p. 5). Accordingly in mid-1990 the first Minister for Senior Citizens was appointed, and the government signalled its intention to establish a new Ministry for Senior Citizens in 1991. Almost immediately this initiative gained a measure of bipartisan support with National also promising to retain the portfolio if elected to government at the elections in October 1990 (Levine & Roberts, 1993 p. 242).

## Policy discourses of the 1990s

### Policy developments in the early-1990s

In November 1990, six months after the passage of the Education Amendment Act and four months after the appointment of the first Minister for Senior Citizens, a National government was elected to office on the promise of a 'decent society', and on a tide of voter disenchantment with a Labour government which had all but destroyed the welfare state compromise. In December 1990, however, one of the first initiatives of the new government was to produce an 'Economic and Social Statement' which announced massive cuts in welfare benefits and housing assistance. This was followed in 1991 by a series of measures designed to cut back radically on the provisions of the welfare state.

While in opposition the National Party had been highly critical of the Labour government's policies on superannuation. In particular it had promised to reinstate national superannuation as a universal pension and to repeal the superannuation surcharge (New Zealand National Party, 1990). In mid-1991 however the government announced its new social and educational policies. These reflected a strong commitment to neoliberalism. On the question of superannuation it was announced that the surtax would be replaced by an income-related means test which would result in superannuation payments declining more steeply than they had under the previous regime. In addition, the age of eligibility for receiving superannuation would be raised from 60 to 65 over a 10-year period instead of over 20 years as promised during the election campaign.

Many measures adopted by government in the early-1990s were grounded in discourses opposed to or unsympathetic to any involvement by the state in lifelong learning and particularly in ACE. Little reference in public policy discourses was made to lifelong learning, and little recognition was paid to the potential significance of a range of lifelong learning initiatives including those

associated with education for older people. Policy, it would seem, was driven firstly by neoliberal ideologues who saw no need to participate in such public discourses and who saw tertiary and post-compulsory education largely as a private good, and secondly by conservatives, many of whom rejected the priorities advocated by supporters of lifelong learning and ACE. Within this context little attention was given to the role of the state in providing, encouraging or supporting the education of older adults.

On the other hand, the dominance of neoliberal discourses did not discount the possibillity of some new initiatives in relation to older citizens, initiatives which reflected an important strand of pragmatism in the National government. A Senior Citizens Unit (instead of a Ministry) was created within the Department of Social Welfare, and in March 1992 the Minister for Senior Citizens announced the establishment of a Senior Citizens Policy Advisory Council to 'help him represent the interests of elderly people in Cabinet by 'analysing issues of concern to senior citizens' and thus improving 'the standard of advocacy' on their behalf' (Levine & Roberts, 1993 p. 253). In addition to this, the early 1990s saw the amendment of human rights legislation. The Human Rights Commission had been established in the 1970s in terms of the Human Rights Commission Act of 1977. In 1990 this Commission presented a background paper to government (Human Rights Commission, 1990), and in July 1990 the Labour Government introduced a draft bill to Parliament which among other things looked to strengthen the provisions to prohibit discrimination on grounds of age across a wide range of areas. This bill remained before Parliament until 1993 when it was passed into law in a modified form under the National government as the Human Rights Act.

In spite of the dominance of neoliberalism, there was over the period of the late-1980s and 1990s considerable growth in the number of learning programmes for older adults. What is striking about this is that the growth was mainly market-driven, with little if any state subsidy. Programmes were driven either by the interests of those older people who could afford to pay their full costs or they were dependent on voluntary unpaid contributions. Thus, the late-1980s and 1990s saw the growth of educational travel programmes for older people both internationally and in New Zealand (Russell, 1993). Secondly, from the early 1990s the U3A movement became an established feature of life in many communities throughout New Zealand. Although it is possible that U3A groups may have been set up in other centres somewhat earlier, it would seem that the first U3A study groups were set up in Auckland in 1989, and in Christchurch in the early 1990s on the

initiative of the University of Canterbury (Heppner, 1994a, 1994b, 1996; Richard Swindell, 1999; Rick Swindell, 2000). Thirdly, the 1990s also saw the establishment and growth of SeniorNet throughout New Zealand (Clarke, 1998; SeniorNet Canterbury, 1996).

As mentioned previously, the growth of these programmes was only possible because of their 'user pays' or self-funding nature. For this reason they and other programmes catered for the growing number of older middle class professional people. They made no claim to be catering for those older people who had been shown in previous research to be under-represented among participants (Benseman, 1996; Tobias, 1991a, 1991b, 2001). To serve the interests of older people from working class backgrounds, including the majority of Mäori and Pacific people, refugees and other minorities, as well as many from working class Pakeha backgrounds, would have required greater resources than any voluntary organisation working without government support could possibly obtain.   In addition it would probably require the appointment of the kinds of 'animateurs' referred to a decade previously by the Lifelong Learning Taskforce (Lifelong Learning Task Force, 1985).

**Policies developments in the mid- to late-1990s**

In the meantime, with reference to policies concerning older people, the mid- to late-1990s saw the continuation of unresolved controversies over the rates of superannuation, the age of eligibility, and over what could be done to ensure its continuing affordability as a universal pension. The number of people aged 65 and over continued to grow - from 350,000 in 1986 to 446,000 in June 1999, and it was estimated that it would continue to rise to 552,000 in 2011 and 980,900 in 2031 (Senior Citizens Unit, 1999).

Within this context the Minister for Senior Citizens, along with the Advisory Council and officials in the Senior Citizens Unit, had key roles to play in contributing to policies affecting older people developed by a range of government agencies. The Advisory Council for Senior Citizens comprised a panel of five to seven community representatives. It was intended to provide the Minister with independent advice, and members were therefore appointed as individuals, because of their knowledge of older people's issues and not as representatives of particular interest groups. Regular consultation with older people's groups was considered to be essential to the Unit developing good advice. It enabled it to keep in touch with issues affecting older people. Throughout the 1990s, however,

the budget for the Senior Citizens portfolio remained in the region of $500,000 with most being spent on personnel costs, and it is not surprising to note that financial constraints were seen at times to impose limitations on the ability of the Advisory Council and the Senior Citizens Unit to consult effectively with groups throughout the country.

The Unit seems at times to have drawn on neoliberal discourses. This occurred for example in its 1999 briefing papers when it highlighted the recommendations of a number of OECD publications which stressed the need to encourage continuing workforce participation by older people. In these papers it appears to conflate debates about older people's employment and place in the labour market with those about older people's continuing contributions to society. It states that: 'The policy conclusion is clear: it is imperative to maintain people in gainful activity longer. In order to achieve this objective, more emphasis must be given to life-long learning for workers of all ages, so that workers maintain their skills and productivity as they grow older' (Senior Citizens Unit, 1999 p. 24). This conclusion is, to say the least, open to question and progressive discourses would reject such a narrow vocationalist understanding of lifelong learning.

**Prime Ministerial Task Force on Positive Ageing, 1997**

At the same time, the mid- to late-1990s saw a growing recognition and acceptance of the need for a more broadly based Positive Ageing Strategy. This policy, which grew out of the work of the Senior Citizens Unit working alongside Age Concern and other voluntary organisations, received strong support from a Prime Ministerial Task Force on Positive Ageing which was appointed by the new National/New Zealand First government established following the 1996 general election (Prime Ministerial Task Force on Positive Ageing, 1997). This Task Force, which produced its report in mid-1997, made a number of recommendations in relation to each of the following aspects:

- Attitudes to ageing - The Task Force recommended establishing flexible approaches to working life, education, care giving and retirement, prohibiting compulsory retirement and communicating positive and diverse images of old age.
- Planning and preparation - The Task Force supported an environment where people could plan and manage their own futures. This would require the integration of government policies and services, more education about life planning, and opportunities for lifelong education, spiritual growth and

fitness at all ages, as well as improved access to community and health services.

- Managing resources - The issue here was to raise skill levels in New Zealand and increase understanding of the ways in which paid and unpaid work is connected to overall wellbeing. The Task Force recommended freeing up workers for voluntary activity, career planning and skill acquisition through life, greater mentoring schemes in business and involving all ages in school and creative endeavours.

- Policy development and service delivery - The Task Force had four major recommendations in this area. They were to: strengthen the policy vote for senior citizens, strengthen research and data analysis on positive ageing and older people, rationalise funding of government community services for older people, and work for greater consistency in the delivery of health care to older people.

- Experiencing positive ageing - The Task Force recommended a number of actions to achieve greater appreciation of diversity, and stronger intergenerational and voluntary commitments. These included the following: Treaty grievances needed to be resolved; more cultural and educational opportunities should be created; programmes that assist people to stay in their own homes should be expanded; town planning, housing, transport and local amenities should integrate the needs of different age groups; the status of volunteer workers and unpaid carers should be improved; and government-community partnerships should be strengthened.

This report is in many respects a remarkable document. It was produced within the context of a government driven largely by a mix of neoliberalism, pragmatism and populism, and some of its recommendations (eg its apparent attachment to individualistic and managerialist solutions in some instances) clearly draw on these discourse. In spite of this its comprehensive policy proposals are grounded in social democratic discourses and progressive ideologies, and assume a substantial role for the state in developing and implementing a positive ageing strategy. The report thus appears to reflect the contradictictory pressures contained in the new politics of MMP as well as a rejection of the previously dominant position of neoliberalism. It should also be noted that each of the recommendations contains a significant educational element or dimension. This was however not always explicit and its implications in terms of the funding of ACE may not always have been recognised.

**International Year of Older Persons, 1999**

In 1992 the United Nations General Assembly had adopted a resolution which proclaimed 1999 as the International Year of Older Persons. This received the full support of the New Zealand government, which co-sponsored several subsequent resolutions in connection with the proposed Year. The United Nations theme for the Year was 'Towards a Society for all Ages', and it was intended to embrace people of all ages and many sectors and organisations. In New Zealand the main objectives of the Year were to promote positive attitudes to ageing, to value older people, and to prepare for an ageing population. Key messages promoted as part of the Year included valuing older people, promoting their independence, promoting greater participation and integration of older people in society, recognising the contributions of older people, and promoting intergenerational activities with older people.

Responsibility for the implementation of the national strategy for the Year of Older Persons was delegated to the Senior Citizens Unit (which was part of the Department of Social Welfare until 1 October 1999 when it was moved into the newly established Ministry of Social Policy), and the Unit worked closely with community organisations representing older people's interests to plan and implement the programme. The government allocated $500,000 for observance of the Year, and the Lottery Grants Board gave $250,000 to support community activities. The establishment of local community co-ordinators in localities throughout the country was seen as an essential component of the national strategy. This was achieved through older people's and iwi/Māori organisations. The role of the co-ordinators was to mobilise communities and encourage the development of activities at the local level.

Three key dates during 1999 were identified and each had its own focus. The first was 1 February, a date which coincided with the removal of an upper age limit on provisions in the Human Rights Act of 1993 prohibiting discrimination in the workplace on the basis of age. The focus around this time was on productive ageing and on 'valuing the contributions of older people'. Two conferences were held around this time, hosted by the Human Rights Commission, which addressed issues arising out of changes in the legislation and employment issues for those 45 years and over. These were intended for employers, policy-makers and others interested. The second key date was 15 May, the United Nations International Day of the Family. The focus here was on 'valuing relationships between young and old'. Activities in May had an intergenerational focus and included the launch and distribution to schools of a 'LinkAge' Handbook providing guidelines on

establishing and maintaining intergenerational programmes especially in schools. The third key date was 1 October, the United Nations International Day of Older Persons. The focus here was on 'celebrating the value of older people' and the day was marked by local celebrations throughout New Zealand.

Twenty-four community projects (out of a total of more than 250 applications) were selected to receive some government funding as part of the year. They included a wide range of learning and educational projects. Some were designed to promote intergenerational understanding and the exchange of skills between generations. Examples included the following: Te Runanga O Whaingaroa Kaeo organised teams of kaumatua and kuia to work with young people suspended from school; Mangere Community Law Office Trust organised under the umbrella of a programme called 'Voyages of Discovery for South Pacific Older Peoples Network' a series of intergenerational workshops for older people to go to Manukau Polytech and local colleges to learn computing, information on rights, retirement planning, record stories, songs and proverbs for families, schools and libraries; and Presbyterian Support in Christchurch organised a series of monthly workshop for older people, carers and families under the title 'Valuing older people through learning'.

Some were designed to develop resources and raise awareness of older people's contributions. For example the Northland Library Network, a local co-operative library in Whangarei run by volunteers, was assisted in developing resources of large-print and audio books; Age Concern Hamilton undertook a revision of an existing resource kit for schools, and developed a new video and worksheets for use in schools; and the Pukeariki Māori Women's Welfare League in New Plymouth researched the lives of older women and celebrated their lives in a 'This is your life'-type event. They also included a variety of displays, exhibitions and radio programmes.

The final report on New Zealand's strategy for the International Year (Ministry of Social Development / Te Manatu Whakahiato Ora, 1999) lists a very large number of local activities which took place throughout the country and sees this as evidence of the success of the volunteer co-ordinators. It also states that an important outcome of the national strategy was 'the strengthening of community networks, including the development of positive relationships and understanding between generations'.

## Policy discourses of the early-2000s

In the lead-up to the general election of 1999, the Labour Party issued a wide range of policy documents. In these documents (New Zealand Labour Party, 1999a, 1999b) Labour empahsised that tertiary education should be seen not as a private good but as a central mechanism of public policy and hence as a public good. It called therefore for a significant shift from the competitive market-driven tertiary education policies, which had dominated much of the previous government's thinking (Ministry of Education, 1998), and instead advocated a more collaborative approach to education.

Labour also issued a separate policy document entitled 'Pathways and Networks - Labour on Adult Education and Community Learning'. In this document it noted that the 'Declaration on Adult Learning' published by the 5th International Conference on Adult Education which had met in Hamburg in July 1997 under the auspices of UNESCO, had called for 'a renewed vision of education in which learning becomes truly lifelong' (UNESCO, 1997). In the light of this, Labour stated that the Party's policy was 'built on a recognition of the crucial role of education in relation to social investment, lifelong learning and nation building' (New Zealand Labour Party, 1999a p. 1).

### The Positive Ageing Strategy

At the general election in November 1999 a Labour/Alliance government was elected, and shortly after taking office, the government moved to review the entire field of tertiary education including ACE. It also took immediate steps to set up a Positive Ageing Strategy which was to form one component of a wider social development strategy. The Advisory Council for Senior Citizens was asked to develop an initial set of principles and these provided the basis for an extensive period of consultation during 2000.

On the basis of this consultation, in April 2001 the Minister for Senior Citizens launched the New Zealand Positive Ageing Strategy. In presenting the Strategy it was argued that until recently much of the discussion of issues of ageing both in New Zealand and internationally had focused on the problems and costs generated by the growing number and proportion of older people.

By way of contrast with this negative, dependency view of ageing and older people, the Office for Senior Citizens stated the following:

'Active ageing, positive ageing, productive ageing and successful ageing are all concepts that advance the theory of ageing as a lifelong process, where positive attitudes to ageing and expectations of continuing productivity challenge the notion of older age as a time of retirement and withdrawal from society. The focus is on lifetime experiences contributing to wellbeing in older age, and older age as a time for ongoing participation in society.

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

The following ten goals were identified for the Strategy:

'To provide or ensure:

1. a secure and adequate income for older people;

2. equitable, timely, affordable and accessible health services for older people;

3. affordable and appropriate housing options for older people;

4. affordable and accessible transport options for older people;

5. older people feel safe and secure and can 'age in place';

6. a range of culturally appropriate services allows choices for older people;

7. older people living in rural communities are not disadvantaged when accessing services;

8. people of all ages have positive attitudes to ageing and older people;

9. elimination of ageism and the promotion of flexible work options; and

10. increasing opportunities for personal growth and community participation' (Senior Citizens Unit, 2001 pp. 19-23).

Linked with each of these goals were a number of actions or action plans which were to be reviewed annually.

From the point of view of education generally and ACE in particular, the most explicit and extensive references to education were contained in the action plans relating to the tenth of the above goals. Actions identified were the following:

1. 'Improve opportunities for education for all;

2. implement adult education and retraining intiatives;

3. encourage utilisation of the experience of older people; (and)

4. promote and support volunteer organisations' (Senior Citizens Unit, 2001 p. 23).

It should, however, also be noted that, as was the case with the Prime Ministerial Task Force in 1997, there were important educational dimensions of most if not all of the other goals – educational dimensions which once again do not always seem to have been recognised or made explicit. To achieve most of the goals it is necessary to promote reflection and informed action by policy-makers and citizens on a wide range of issues on a lifelong basis. This is necessarily an educational task involving two kinds of inter-related learning objectives:

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

It could be argued that bridging the gaps that may occur between these two forms of experience, knowledge and action – the personal and poliitcal – is a central purpose of ACE and that it should be more widely recognised that the personal is political, and vice versa (See James, 1982; Leicester, Modgil, & Modgil, 2000; McClenaghan, 2000; See Mills, 1959).

## Summary & conclusion

This paper has described and offered a critique of policies and policy documents relevant to education and older adults from the 1980s to 2001. It points to an ongoing struggle between competing discourses and ideologies, and argues that these conflicts have had a significant influence on policies and policy documents.

The paper suggests that the 1970s saw the rise of progressive and social democratic discourses, but that by the early 1980s a number of changes were taking place which ushered in a period of pragmatic and populist conservatism. Nevertheless, the early 1980s also saw the first significant moves by the state to begin to investigate expanding its role in relation to the growing number of older people. The paper summarises the findings of a report on ageing by the Social Advisory Council – a report which arose out of New Zealand's participation in the UN's World Assemby on Ageing held in 1982 – and which led in 1984 to the setting up of an Ageing and Education Working Party.

Then in 1984, a Labour government was elected, and the paper reports on some aspects of the ideological struggles within government over the following six years. On the one side were advocates and supporters of a new progressivism, which looked to build on the social democratic agendas of state activism of the 1970s. They looked to extend these policies and to use the instruments of the state to achieve a range of anti-nuclear and egalitarian goals, in particular in

relation to gender and the Treaty of Waitangi. It was these social democratic discourses which underpinned the work of the Royal Commission on Social Policy and in particular its proposals and those of the Ageing and Education Working Party discussed in this paper. On the other side were neoliberal ideologues who looked to dismantle the welfare state and eventually to privatise most if not all the agencies and functions of the state including its functions in education, while withdrawing state subsidies of ACE agencies.

As the paper indicates, these struggles continued through the 1980s and on into 1990 when Labour was voted out of office and replace by a National government almost completely dominated by neoliberal ideologies. Many of the measures adopted by National and National-led governments in the 1990s were grounded in discourses opposed to or unsympathetic to involvement by the state in the provision of ACE or in any social servies other than those required within a narrow welfarist ideology. In spite of this, conservative pragmatism and a revival of populism in the mid-1990s did endorse the need for action to address ageism and other issues. It was this that sustained the work of the Senior Citizens Unit through the 1990s and led to the appointment Prime Ministerial Task Force on Positive Ageing in 1997, a Task Force whose report provided ideological support for the development of a progressive positive ageing strategy. In spite of this, little reference in public policy discourses was made to lifelong learning, and little recognition was given to the potential significance of a range of lifelong learning initiatives including those of ACE in providing education about ageing and for older adults. Through much of the 1990s it would seem that policy was driven firstly by neoliberal ideologues who saw no need to participate in such discourses and who saw tertiary education largely as a private good, and secondly by conservatives, many of whom rejected the priorities advocated by supporters of lifelong learning.

In 1999, following a decade in the wilderness, a Labour government was elected and with it came some form of revival of social democratic discourses. This paper describes the Positive Ageing Strategy which was launched by government in 2001. It points out that this Strategy grew out of the work of the Office for Senior Citizens, the Prime Ministerial Task Force of 1997, and the UN International Year of Older People in 1999, and it concludes by identifying some explicit and implicit implications for education and older adults.

By way of conclusion I would like to draw attention to two issues which have been

highlighted by the work undertaken for this paper.

- Firstly, if the interests of older people from working class backgrounds are to be served effectively - and this includes the majority of Mäori and Pacific people, refugees and other minorities, as well as many from working class Pakeha backgrounds – this will require greater resources than any voluntary organisation working without government support could ever hope to obtain.

- Secondly, if the full potential of the Positive Ageing Strategy is to be realised policy-makers will have to recognise the educational dimensions of each of the goals and resource them accordingly, and adult and community educators will need to be ready to pick up the challenge to develop programmes to enable people to bridge the gaps between the two forms of experience, knowledge and action – the personal and poliitcal. They will need to see this task as one of the central tasks of ACE.

In a future article I will examine the ways in which the Positive Ageing Strategy has been implemented since 2001, along with relevant changes in tertiary education in general and ACE. In this article I will also pay further attention to the above two issues within the context of the implementation process.

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