Fifty years of learning by older adults in Aotearoa New Zealand

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This paper reflects on the history of adult and community education (ACE) in Aotearoa New Zealand with special reference to older people's learning. The paper adopts a critical framework and draws on both primary and secondary sources. Key economic, political, social, demographic and cultural forces are discussed along with the huge growth in tertiary education, the increasing pressures on people to continue their education in later life, and the impact of social movements on this expansion. This growth in tertiary education has not been paralleled by a comparable growth of ACE, and I argue that the history of ACE is in fact more complex and subtle, with many different stories being told. I then discuss the history of older adults' learning and report briefly on some ACE programmes which have emerged over the years and some trends in government policy with special reference to the New Zealand Positive Ageing Strategy and its implications for older people's learning. In the light of the positive ageing rhetoric I also raise questions about the very limited government investment in ACE generally and in particular in older people's learning.

Introduction

This paper reflects on the history of adult and community education (ACE) in Aotearoa New Zealand from the 1970s to 1916, with special reference to the learning and education of older adults. The paper locates ACE within the context of tertiary education. It adopts a critical perspective (Bowl & Tobias, 2012) and draws substantially on my recent history of ACE (Tobias, 2016) as well as a wide body of primary and secondary sources including documents and reports from the New Zealand Office for Senior Citizens Te Tari Kaumatua.

For the purpose of the paper the focus is on learning by older adults defined as those 65 years and older. It is important to note however that any definition of 'older adults' is problematic. Although chronological age may be a significant factor influencing people's lives, learning experiences and perspectives, and may be a convenient 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.

Background

Over the past fifty years – from the 1970s to 2016 - the scope of tertiary education in Aotearoa New Zealand has been enlarged and its shape transformed. This has occurred in response to a number of economic, political, social and cultural changes including growing inequalities under the influence of neoliberal policies, and the rise of several progressive social movements, particularly those associated with the Māori renaissance (Tobias, 2016).

The period was also one of major demographic change. In common with many other countries, the number and proportion of people living to an older age increased significantly. Between 1984 and 2014 the number of people age 65+ doubled to reach 650,000 and the percentage of the total population 65 or over had risen from 10 to 14 per cent (Office for Senior Citizens/Te Tari Kaumatua, 2015a; Statistics New Zealand).

The growth of tertiary education

Over the past 50 years there has been a huge growth and diversification in the provision of post-compulsory and tertiary education (Findsen, 2006). Several forces contributed to this. They included increased endorsement of education as a key factor in human resources development (HRD); growing diversification and privatisation of education; increasing commodification of education; the continuing professionalisation of occupations & growing credentialism (Tobias, 1999, 2003); and the expansion of managerialism and welfarism in education (Fitzsimons, 2004). They also included the rise of progressive movements e.g. the environmental, peace, women's, LGBTI and other social change movements, the Mäori renaissance and the struggles by Mäori for recognition of their political authority, their language, culture and land; and the significance of organisations of civil society (Tobias, 2016:77-78).

There has also been an increase in the number and range of different types of institutions and organisations providing tertiary education. In the 1960s the field was dominated by the universities. Technical institutes were only beginning to emerge out of the technical high schools; there were a few private colleges; several training workshops were run by government departments, and the provision of ACE was dominated by universities, schools and Workers Education Associations (WEAs). By the early 2000s the picture had changed completely. Its scope had broadened to include 35 public tertiary education institutions (TEIs) comprised of eight Universities, 20 Polytechnics, four Colleges of Education and three Wänanga (Mäori Universities), over 500 registered Private Training Establishments (PTEs), 46 Industry Training Organisations (ITOs), nine Government Training Establishments (GTEs) and 17 Other Tertiary Education Providers (OTEPs) (Ministry of Education/Te Tahuhu o te Matauranga, 2002; 2004). It also included a number of ACE providers and Rural Education Activities Programmes (REAPs), ACE funded schools, voluntary organisations and community groups (Findsen, 2006; Tobias, 2016:77-78).

Overall trends in ACE

The growth of tertiary education has not been paralleled by a comparable growth of ACE. The history of ACE is more complex and subtle. It is in essence a social and educational movement (or part of

a wider movement) at least as much as it is a sector of education or a cluster of organisations (Tobias, 1996).It is therefore perhaps not surprising that many different histories may be told. The predominant ones, however, have been stories of ebbs and flows in the fortunes of ACE in response to changing imperatives.

One feature of ACE that has remained relatively constant is that, in relation to most other sectors of education, it has generally been under-funded and under-resourced by the state — the educational 'poor cousin' (Newman, 1979). A second is that, while it has depended on an army of volunteers or unpaid workers (Peet, 1997; Terry, 1994), and consisted for the most part of NGOs, voluntary organisations and community groups of all kinds including REAPs, it has also generally been supported, albeit at the margins, by schools, community colleges, polytechnics, wänanga and universities (Tobias, 2016:78). A third feature of ACE that distinguishes it from other sectors is that people of all ages including a significant number of older people have participated in ACE programmes. Older people do participate in formal education. However they participate in larger numbers in ACE. Data are lacking on the extent of this participation. However it seems probable that older people's levels of participation in ACE may have ebbed and flowed over the years with high points being reached in the mid-1970s and mid-2000s and lows in the mid-1990s and mid-2010s. (Tobias, 1991, 2007; Tobias & Bowl, 2012).

Trends in public policies on ageing and learning programmes for older adults

The 1970s and 1980s

As has already been noted the number and proportion of older adults participating increased significantly over the years. In the 1970s the Canterbury Workers' Education Association (WEA) led the way in developing its Wider Horizons day-time programme, probably the first ACE programme specifically intended for older adults (Roth, 1974, 1977).

In the 1980s several policy and programme initiatives were launched specifically addressing the learning needs of older people. One early response to demographic change was the publication by Age Concern of a discussion paper which drew attention to several overseas programmes of learning for older people and outlined a set of proposals

for the development of lifelong learning opportunities in New Zealand (Mackie, 1984). In the same year the New Zealand Social Advisory Council published a report which recommended that the then National Council of Adult Education (NCAE) should 'encourage informed public discussion on attitudes to later life, taking the initiative to promote this concern through existing networks' (Williams, *et al.*, 1984:19). These recommendations, that highlight the importance of providing learning opportunities for older people, were supported by Age Concern. Between August 1984 and 1987 the NCAE Working Party on Ageing and Education promoted a wide range of activities including television and radio programmes and regional seminars to achieve its objectives (Ageing and Education Working Party, 1987).

In 1986 the Royal Commission on Social Policy was established by the Prime Minister to counter increasingly dominant market-driven neoliberal discourses. It 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 were also identified by the Ageing and Education Working Party (Royal Commission on Social Policy, 1988). The 1980s also saw a number of local ACE initiatives across the country involving educational institutions, local authorities, social service agencies and voluntary organisations (O'Rourke, 1984; Patterson, 1999; Somerville, 1987; Tobias, 2000).

The 1990s

The late-1980s and 1990s saw the growth of educational travel programmes for older people both internationally and in New Zealand (Russell, 1993). These programmes, mainly sponsored by the Australian and New Zealand College for Seniors in the 1990s, grew into successful commercial enterprises.

In addition, from the early 1990s the U3A movement became established in many communities throughout New Zealand. The first U3A groups were set up in Auckland in 1989 and Christchurch in the early 1990s (Heppner, 1994a, 1994b, 1996; Swindell, 1999, 2000). These groups, all autonomous and self-funding, varied widely in their organisation and formality. Some focused on research, study and discussion; others organised regular series of lectures by visiting authorities; while others drew primarily on members themselves to give

talks and lectures. By 2016 there were 73 U3As around the country (New Zealand U3A, 2016).

The 1990s and 2000s also saw the establishment of SeniorNet throughout New Zealand. SeniorNet is a non-profit community-based organisation which aims to give people over the age of 55 access to computer technologies and opportunities to acquire and share their knowledge and skills, relying on peer tutoring. SeniorNet originated in the USA in the mid-1980s but grew rapidly in Aotearoa. By 1998 there were 23 and by 2016 there were 76 SeniorNet learning centres (Clarke, 1998; SeniorNet Canterbury, 1996; SeniorNet New Zealand, 2016).

In addition ACE programmes continued to be offered by NGOs, schools, REAPs, polytechnics and universities. Of great significance as part of the Māori renaissance, and following pressure from the Waitangi Tribunal, the wānanga of old were gradually re-established in modern form.

On the policy front, in response to sustained opposition to a proposed superannuation surcharge and in accordance with recommendations by the Royal Commission on Social Policy, in July 1990 the Labour government established a post of Minister for Senior Citizens and appointed the first Minister. In addition, it signalled its intention to establish a new Ministry for Senior Citizens. Almost immediately this initiative gained bipartisan support, and in November 1990 when a National government was elected, it also appointed a Minister for Senior Citizens. At the same time however the new government set in place educational and social policies firmly grounded in neoliberal and conservative discourses. Nevertheless in response to political necessities it moved cautiously and pragmatically on policies relating to older people. 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 to 'represent the interests of elderly people in Cabinet' (Levine & Roberts, 1993:253). In addition, the early 1990s saw human rights legislation amended to prohibit discrimination on grounds of age across a wide range of areas.

Through the early-1990s the Senior Citizens Unit, acting with the advice and support of the Advisory Council, did what it could to promote the interests of older citizens. By the mid-1990s however there was growing recognition of the need for a more broadly based Positive

Ageing Strategy. This idea which grew out of the work of the Senior Citizens Unit, working alongside Age Concern and other voluntary organisations, received strong support from the Prime Ministerial Task Force on Positive Ageing, appointed by the National/New Zealand First government following the 1996 general election. In mid-1997 this Task Force produced a wide-ranging report (Prime Ministerial Task Force on Positive Ageing, 1997).

Among other things, it recommended: establishing flexible approaches to working life, education, care giving and retirement; prohibiting compulsory retirement, communicating positive and diverse images of old age; preparing an environment in which adults of all ages could plan and manage their own futures; freeing up workers for voluntary activity, career planning and skill acquisition through life, greater mentoring schemes in business, involving all ages in school and creative endeavours; strengthening policy development and service delivery; achieving greater appreciation of diversity; and stronger intergenerational and voluntary commitments. In many respects this report was a remarkable document: Although it drew on neoliberal discourses it also reflected other more pragmatic discourses which had gained a parliamentary voice within the system of proportional representation introduced in the 1996 general election. Whilst each of the recommendations contained potentially significant educational dimensions this was seldom made explicit and its implications in terms of the funding of ACE and learning programmes for older people were largely unrecognised or ignored.

A 1992 United Nations resolution led to 1999 being proclaimed the International Year of Older Persons. The theme for the Year 'Towards a Society for all Ages' 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 included valuing older people, promoting their independence and greater participation and integrating older people in society, recognising their contributions, and promoting intergenerational activities.

Activities organised included a range of ACE programmes. Volunteer Community Coordinators (VCCs) were appointed in 29 locations throughout New Zealand. Their role was to encourage local involvement

in activities and to ensure that the Senior Citizens Unit was informed about planned community events. They were nominated through older people's organisations such as Age Concern and by iwi/Mäori organisations. A small initial grant was provided to reimburse each nominating organisation for the volunteers' expenses and a further grant was later provided to contribute to the costs of local events. During the year, the Senior Citizens Unit maintained regular contact with the VCCs, providing administrative and other support. The Final Report on the year stated that, 'The VCCs played a critical role in developing networks within their communities and encouraging activities at the local level' (Ministry of Social Development/Te Manatu Whakahiato Ora, 2000:11). This report also listed the large number of local activities which took place throughout the country and stated that an important outcome of the national strategy was 'the strengthening of community networks, including the development of positive relationships and understanding between generations' (Ministry of Social Development/Te Manatu Whakahiato Ora, 2000:3).

The early-2000s

After the general election in November 1999 the newly elected a Labour/Alliance government moved to review the entire field of tertiary education. To this end a Tertiary Education Advisory Commission (TEAC) was set up which recommended, inter alia, the establishment of a Tertiary Education Commission (TEC) to be responsible for all forms of tertiary education including ACE. In December 2002 the *Education (Tertiary Reform) Amendment Act* was passed setting this Commission in place.

In 2000 Government also took steps to set up a Positive Ageing Strategy. This formed one part of a new social development strategy (Ministry of Social Development/Te Manatu Whakahiato Ora, 2001). The Advisory Council for Senior Citizens was asked to develop an initial set of principles as the basis for extensive consultation during 2000. Thirty-four community consultations were held around the country, including four meetings specifically for Mäori and three for Pasifika people. In addition over 100 leaders from the voluntary, business, health, education, local government and central government sectors attended a Forum in Wellington organised by Age Concern New Zealand. Included among the thirteen recommended 'Points of Action' was one

of 'Fostering life-long learning for all age groups' (Senior Citizens Unit, 2001: 30).

On the basis of this consultation, in April 2001 the Minister for Senior Citizens launched the New Zealand Positive Ageing Strategy. It provided a set of ten 'policy principles' (Senior Citizens Unit, 2001:16-17) and ten 'priority goals' (Senior Citizens Unit, 2001:19-23) each linked to 'action plans' which were to be reviewed annually. The Strategy clearly identified a role for education. It stated that, 'The ability to age positively is assisted by good investment in education throughout life ...' (Senior Citizens Unit, 2001:10). One of the ten goals anticipated: 'Increasing opportunities for personal growth and community participation', explicitly including:

> *... improving educational opportunities for all, implementing adult education and training initiatives, encouraging utilization of the experience and skills of older people, and promoting and supporting volunteer organisations' (Senior Citizens Unit, 2001:23).*

The Strategy 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. In contrast to this negative, dependency view of ageing and older people, the Office for Senior Citizens stated that:

> *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. (Office for Senior Citizens/Te Tari Kaumatua, 2002:39)*

In summary although the Positive Ageing Strategy highlighted the significance of older people's learning and anticipated ACE's important contribution, no concrete recommendations were made on the kind and level of government financial support that would be required. Presumably it was thought that programmes would be self-funding or that this would be taken care of by the TEC.

In addition to the overall review of tertiary education instituted by the Government in 2000, separate groups were appointed to review every aspect of education and training and social policy. A central aim was to move agencies and institutions from reliance on market driven, competitive mechanisms and policies to those that were more suited to a progressive social democracy. One of these groups was the Adult Education and Community Learning Working Party. The report of this group (Adult Education & Community Learning Working Party, 2001) embraced all aspects of ACE. One part the report drew attention to the role of ACE in working with those in greatest need including many older people, contributing to the strengthening of civil society, and identifying new national educational needs. The report included a review of research, and one section identified selected studies pointing to the benefits of educational participation for positive ageing (*ibid*.:66).

It argued that an ageing population would need ways to maintain their sense of connection and usefulness to society. ACE, it argued, had always played this important role. It had provided a wide range of learning opportunities and allowed older people to teach or tutor, often on a one-to-one or voluntary basis, thereby sharing their knowledge and skills with others (*ibid*:14). The report also argued that

> *ACE needs new structures and processes to ensure that all providers are of a high standard, and that they are responsive to the needs of key population groups, including Māori, Pacific people, new migrants and refugees, the disabled, older adults, some groups of women, rural people and increasingly, men"* (ibid.:29).

In light of this report in 2003 the Government endorsed the following national goals for ACE. Funding of ACE programmes by the state was to hinge on whether they contributed to: (1) strengthening social cohesion; 2) meeting identified community learning needs; (3) encouraging lifelong learning; (4) targeting learners whose initial learning was not successful; and (5) raising foundation skills.

The following few years saw the implementation of the new policies and the continuation and expansion of some forms of ACE, including ACE NGOs, ACE supported by schools, polytechnics, REAPs, universities, wānanga, U3As and SeniorNet groups. The period also saw the continuation of the New Zealand Positive Ageing Strategy, administered

nationally by the Office for Senior Citizens/Te Tari Kaumatua in the Ministry of Social Development/Te Manatu Whakahiato.

The impact of the Strategy was indicated by the wide range of 'actions' taken by central government agencies, the steady increase in the number of local councils' involvement (Office for Senior Citizens/Te Tari Kaumatua, 2008b: iii), and by the increasing number of Volunteer Community Co-ordinators, which grew from 29 in 1999 to 40 in 2007 (Office for Senior Citizens/Te Tari Kaumatua, 2007: iii) and about 50 in 2008 (Office for Senior Citizens/Te Tari Kaumatua, 2008a:19).

The early 2000s also saw the setting up of a large number of diverse Men's Sheds across New Zealand. In general they aimed to 'bring men together in one community space to share their skills, have a laugh, and work on practical tasks individually (personal projects) or as a group (for the Shed or community)' (Menzshed New Zealand, 2016). Their primary focus was on engaging with older men no longer in the paid workforce. There is evidence that they have contributed significantly to the health and social wellbeing of their members especially in breaking down the loneliness and isolation of many men on their retirement (Golding, 2015; Snow, 2012). Although mainly intended for men, women have also been involved with many Shed organisations.

Perhaps the first community workshop, 'Claystore', was launched in the 1980s in Devonport, Auckland (Bruce, 2011). However it was not until 2007 that the first Men's Sheds were opened in Hamilton, Mosgiel and Dunedin in December 2007 and five others in Thames, West Franklin, Naenae, Wellington and Christchurch by March 2008. Drawing inspiration from Australia (Bruce, 2007), the Men's Sheds movement grew rapidly over the following years and by 2015 there were more than 90 men's sheds set up throughout the country.

From the outset links were established with schools, REAPs and other ACE organisations as well as several social service and public health agencies and local authorities. Financial and logistical support was obtained from some of these agencies. However, by way of contrast with Australia, no financial support was received from the central government. In September 2013 a national organisation, Menzshed NZ, was established with the aim of providing support for member sheds and facilitating public access to them (Menzshed New Zealand, 2016).

The period since 2008

In October 2008 a National-led government was elected and over the following years significant cuts were made in the funding of ACE programmes. Inevitably this reduced the availability of educational opportunities for older adults (Tobias, 2016:71-73). The Positive Ageing Strategy was retained, albeit with significant changes in priorities and in the work of the Office for Senior Citizens. In 2010 a new project was launched which focused primarily on the place of older people in the economy, and early in 2011 the first in a series of publications entitled 'The Business of Ageing' was published (Office for Senior Citizens/ Te Tari Kaumatua, 2011). This report focused on what it described as the 'two opportunities for New Zealand's growth over the next 40 years'. It highlighted firstly, the increasing number of older people with high levels of skill 'who choose to remain active in the workforce', and secondly, 'the growing consumer market among older people who were healthier, better educated and have more spending power than any other generation reaching 65 in New Zealand's history' (Office for Senior Citizens/Te Tari Kaumatua, 2011:1).

This was followed in 2013 by the publication of a 40-page booklet, 'Older New Zealanders' (Office for Senior Citizens/Te Tari Kaumatua, 2013b). It outlined many of the actions the Government was taking to 'deliver on the vision outlined in the Positive Ageing Strategy to enable older people in New Zealand to be healthy, independent, connected and respected' (Office for Senior Citizens/Te Tari Kaumatua, 2013b:8). Also in 2013 the Office for Senior Citizens produced an update on the 2011 report on 'The Business of Ageing' (Office for Senior Citizens/Te Tari Kaumatua, 2013a), undertaken in response to increases in older people's participation in the labour force and new projections from Statistics New Zealand of their future participation rates. It also considered other changes e.g. changes in tax rates, since 2011.

The Office for Senior Citizens published no major reports in 2014 but produced two in 2015. The first was the report on the Positive Ageing Strategy (Office for Senior Citizens/Te Tari Kaumatua, 2015a), building on the 'Older New Zealanders' report of 2013. It focussed on key aspects of an ageing society and reasserted the continuing significance of the ten goals of the Positive Ageing Strategy. It also documented key trends in positive ageing and reported on progress towards achieving each of

the goals. The second was an update of the 2011 publication on 'The Business of Ageing' (Office for Senior Citizens/Te Tari Kaumatua, 2015b). It incorporated data from Statistics New Zealand as well as post-2011 data which showed that in the coming decades older New Zealanders were likely to make an even greater contribution to the economy than was predicted in the 2011 and 2013 updates. Its findings highlighted a number of trends: Older people were becoming a large and growing consumer group, playing an increasing role in the paid labour force (New Zealand already has one of the highest labour force participation rates by older people in the OECD). Older people's earnings from paid work also continued to increase including their tax contributions, along with their contributions to the voluntary sector.

Despite the comprehensiveness of the 2015 reports they failed completely to draw explicit attention to the many actual and potential contributions of education and especially ACE to ageing policies. Indeed ACE has been dropped entirely from the tenth goal of the Positive Ageing Strategy despite its key potential role in increasing opportunities for personal growth and community participation by older people.

Conclusion

This paper reflects on the history of ACE and in particular the education of older adults in Aotearoa New Zealand from the 1970s to 2016. In the light of population ageing it describes some policy and programme trends and initiatives in relation to ACE, especially those relevant to older adults. In particular it describes the emergence of the Positive Ageing Strategy in the 1990s and early 2000s, a strategy which was intended to move the dominant discourse about ageing away from negativity and dependency to one which privileged the positive and emphasised the contributions of older people to society.

The paper argues that while most forms of education including ACE and older people's learning were shaped and re-shaped by neoliberal and conservative discourses during this period, these discourses were challenged by social democratic and pragmatic discourses and by progressive social movements, including those associated with the Māori renaissance.

On one hand neoliberal discourses rose to prominence in the mid-1980s and were especially powerful in the early-1990s and in the period from 2008.

The paper notes the growing impact of privatisation, commodification and credentialism on tertiary education, and the increasing withdrawal of state funding for ACE in these periods. On the other hand social democratic discourses came to the fore in the early-2000s during which time the state took a more active role in supporting ACE and the development of lifelong learning as suggested by the Positive Ageing Strategy.

From 2008 however, although the government retained the rhetoric of positive ageing, its focus was narrowed, and state funding of ACE programmes including those that appealed to older adults was largely withdrawn. Since that time a 'disconnect' has emerged between the state's Positive Ageing Strategy and its policies on older people's learning. Programmes for older adults have been driven mainly either by those with the necessary material, social and cultural assets to cover the costs of participation, or they have been largely dependent on voluntary unpaid contributions.

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About the Author

Robert Tobias, who is currently Adjunct Senior Research Fellow, College of Education, University of Canterbury, migrated to Australia with his wife, Bertha, in 2015. An older learner now himself, he has for many years been an organiser, teacher and researcher in adult education. His areas of research interests both in South Africa (where until 1978 he was director of extra-mural studies at the University of Cape Town) and in New Zealand Aotearoa have included most aspects of lifelong learning and adult and community education policy and practice.

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