Choice and Opportunity:

Learning, well-being and quality of life for older people

A guide for local authorities, primary care trusts and their partners

niace

promoting adult learning

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Learning, well-being and quality of life for older people

Be active

Keep learning

Take notice

Connect

Give

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NIACE has a broad remit to promote lifelong learning opportunities for adults. NIACE works to develop increased participation in education and training, particularly for those who do not have easy access because of class, gender, age, race, language and culture, learning difficulties or disabilities, or insufficient financial resources.

You can find NIACE online at **www.niace.org.uk**

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1 Introduction

The UK's population is ageing rapidly. Most people are living longer, and the generation now entering their 60s has different, and more demanding, expectations of 'retirement' from their parents.

Learning, in all its forms, can make a great difference to well-being and quality of life after 50. People who have the opportunity to engage with others and to remain physically and socially active live longer and healthier, and make fewer demands on public services. Learning helps put people in control of their lives, and as the number of older people grows, and the period most of us spend in 'retirement' grows longer, this is increasingly important.

For this reason, local authorities and their partners have a clear interest in ensuring that a wide and relevant range of opportunities to learn are available to older people in their areas, although many of these will be delivered by other agencies.

We believe that adult learning should be seen as a key component of many public services, rather than simply a (low priority) leisure service. However, the opportunities to learn available to people over 50 vary enormously, according to locality, historical accident and personal circumstances.

This document aims to help local authorities tackle their responsibilities for the learning needs and aspirations of their older citizens. We are not proposing another set of grand strategies, but we do believe that the welfare of older people, and the wider community, will be better served if local authorities approach older people's learning strategically, considering what might be needed, and how it might be secured, rather than allowing historical accident to dictate what happens.

This report has been prepared by people whose main background is in adult learning, but its audience is much wider. We have tried to ensure that we understand the issues of other professions, and especially health and social care. We hope that professionals from those fields will forgive any inadvertent misrepresentation of their policies and interests.

Finally, we would like to thank colleagues from Essex, Dudley, Surrey and Portsmouth and from the Local Government Association for their help in the preparation of this report

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NIACE

2 This report

What is this report?

This report provides a framework for understanding the contribution that learning (of all kinds) can make to the well-being of older people.[1] It aims to help local authorities and their partners to review how well they are meeting the needs of all their older citizens, and provides a tool to consult with older citizens about how to improve what is available.

It is based on what is known about:

- challenges that people face as they age;
- demands and hopes of people for later life; and
- what promotes individual well-being.

Who is it for?

Many people have an interest in the well-being of older people in local communities, and all of them may find some of the material here of some interest. However, the main audience is officers of local authorities with lead responsibility for ageing policy and for adult learning. It may also be relevant to those working in health authorities on public health issues.

> *"I like it that I am in charge of which interests we follow."*

Why have we produced it?

We live in an ageing society. Over the next few decades, the number of people over 60 will rise rapidly, and the numbers over 80 will rise even more. Most people already live a third of their adult lives in relatively active 'retirement', and that population, and the length of this life phase, will both grow.

Local authorities have a responsibility for the well-being of all their citizens, and for the efficient management of public resources to support this. Learning can improve the quality of life of older people, and sometimes this learning can result in significant savings in public expenditure.

Many authorities have a strategy for ageing, but in 2009 the Audit Commission found that many did not, and that many of those with ageing strategies focused them exclusively on those in need of social care, rather than on the (much larger) older population as a whole.

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1 For convenience we take 'older' to embrace the full range from age 50 upwards, including the 'third age', when people are still healthy and active, and many are still in some form of employment, and the 'fourth age' when they are becoming increasingly dependent on others in everyday life.

What is the problem?

The problem is simply stated: learning can make a major difference to the quality of life and well-being of older people, but opportunities to learn in any given area do not reflect any kind of coherent view of what people might need or want. The pattern is often confused by overlapping and conflicting policies (at local and national levels), and we are losing the sense of a common activity shared by people from a wide range of backgrounds and motives, which strengthens and empowers individuals and the communities in which they live.

Furthermore, opportunities are not always available to those who might benefit. In many places we have a 'universal' service, theoretically open to all, but recruiting from those who can pay, alongside targeted services for particular disadvantaged groups, often delivered in different places and ways, with the risk of intensifying their isolation from wider society. The result is a diverse, but very patchy, range of opportunities, very different in different places, and much more accessible to some people, and in some places, than others.

Why not? Older people as researchers

The government is keen to see older people more directly engaged in the development of services, and not merely as passive respondents to consultations. To encourage this, the county council developed a learning programme, in partnership with the local university, to equip older people with the skills and knowledge to carry out research in their own right, using and building on their own life experience.

The *Why Not!* Older Peoples Research Group, now consists of 15 older people who have completed a 12-week training programme, equipping them with the skills to undertake basic social research. Those involved now make an informed and active contribution to service development and design, helping to shape the approach to research itself. The group now carries out research for a range of the county council's teams and partners, including the local primary care trusts (PCTs).

What is happening?

Across England, participation in the traditional local authority adult education service has declined. Although some national funding has been protected, the expansion of government funding for further education has focused on qualification-bearing courses for people of 'working age', while many local authorities abolished fee concessions for older learners, mistakenly believing that this was required by new legislation on age discrimination.[2] This has happened despite the fact that these services generally have extremely high levels of client satisfaction;[3] those who participate value it highly and protest loudly when their services are threatened. Similar pressures have shaped the opportunities provided by voluntary organisations and independent course providers. Some third sector organisations provide training for volunteers in specific roles, while others provide more general learning programmes, but these tend to reflect the enthusiasms of particular people and groups at a given time, and what funders will pay for. Meanwhile, the opportunities provided by health services reflect the particular priorities of primary care trusts, and focus on people with, or at risk of, specific medical conditions.

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2 We believe that this decision rested on a misinterpretation of the law. The joint NIACE/Age Concern/Help the Aged briefing paper explains how such fee concession policies can be justified under the Employment Equality (Age) Regulations 2006 (see NIACE with Age Concern/Help the Aged, 2009).

3 Higher than other kinds of education and higher than most other public services.

3 Ageing and the changing nature of later life

Everyone has their own notion of what 'old' means, often based on the experience of past generations, and its meaning has changed dramatically over the last century. Average life expectancy continues to grow, and, for the first time in human history, many people can now expect decades, rather than years, of active retirement.

Any definition of 'older' that cuts off at a particular age is bound to be arbitrary but here we use 50, which is the commonest definition in most policy documents and research. After that point, declining health and caring responsibilities begin to drive some people out of work, and age discrimination begins to make it difficult to return to work after redundancy.

'I used to think that my days of learning were over 30 years ago!'

However this does not mean that everyone from 50 to 110 has similar needs. People do not become more alike as they age, and it is particularly important to distinguish between what has been called the 'third age' and the 'fourth age'. The former is a period of relatively good health, when most people wish to remain actively engaged in the community, including through paid and voluntary work, as well as pursuing active interests. The latter is a period when physical and mental dependency increases, and, although learning can continue to improve well-being, it will need to be increasingly tailored to particular circumstances. However, the boundary between these two stages varies greatly between individuals; some people in their 90s are still living entirely independent active lives, while others are constrained by ill health in their early 50s.

It is also important to recognise the impact on individuals' ageing of their past life and circumstances. Within a single local authority area, life expectancy can differ by more than ten years between different wards, and different social groups. Many people who have worked in traditional heavy manual occupations, or have experienced long periods of unemployment or poverty have much lower life expectancy, and are likely to be much less physically capable in their 60s than those in more favoured circumstances. These differences shape expectations of what it means to be 'old', and what individuals think they can do, and can expect from the future.

Rising life expectancy is a cause for celebration, an opportunity and a challenge. Most people can expect to live longer than any previous generation in human history. Although illness and disability are still a feature of later life, most of these added years will be spent in relatively good health, and old age is no longer synonymous with poverty. Most can expect to have more control over how they spend these added years than they have had in their earlier adult lives. However, the paradox of age policy is that we wish to celebrate this new age of opportunity at the same time as we address the real problems of old age. To those older people still experiencing real poverty, poor health and isolation, emphasising these positive features can seem an insult. A key challenge for public policy is to address the problems without reinforcing negative stereotypes of age, which encourage people to limit themselves, to fear age, and to avoid preparing for it.

Adult learning is partly about helping people overcome the problems, but it is also about seizing the opportunities to grow, to challenge oneself, and to engage with the world around them in new and exciting ways.

Self-sufficiency: Menus for Men

This programme was funded by the local authority's adult learning service, in partnership with the primary care trust, neighbourhood management officer and a local secondary school, as part of targeted community provision.

It began as a three-week taster course for ten men over 60, using the facilities of the school, and developed into a longer course on the request of the learners.

The learners were recruited by outreach workers in a priority neighbourhood. They learned to prepare and cook a three-course meal and learned about food hygiene, kitchen safety, nutrition and healthy eating. They made dishes like garlic and lemon chicken and coconut rice pudding with mango.

4 Well-being and adult learning

Why wellbeing?

We all recognise that living a satisfying and fulfilling life involves more than having enough money and somewhere to live. In recent years, policymakers have become increasingly interested in how public services and policies can promote the well-being and quality of life of individuals.

Well-being is about flourishing, a sense of control over one's life, of positive interactions with other people, and of a future to look forward to. While well-being is more difficult to sustain if one is ill, it is much more than the absence of illness. Promoting it is thus a matter for many agencies, public, private and voluntary.

Local authorities now have a statutory power to take action to promote well-being; it is included in local authority performance indicators; and aspects of well-being are monitored in the Place Survey, and in the European Social Survey.

What promotes wellbeing?

In 2009 the government published the report of a groundbreaking study carried out by the Foresight Unit of the Office of the Chief Scientist into 'Mental Capital and Well-being'. The study reviewed the current state of scientific knowledge on ways of increasing the knowledge, capacity to learn, well-being and resilience of individuals, and the ways in which societies and governments can support this. The report drew on a very wide range of academic disciplines worldwide, with studies from fields as diverse as neuroscience, management theory, education and pharmacology.

One of its key outcomes was a very simple prescription for the promotion of individual well-being, modelled on the successful 'five a day' public health campaign on diet. The report concluded that individual well-being is enhanced if individuals do five simple things:

'It's such a lovely relaxed and informal atmosphere here at the library. I've made some wonderful new friends and achieved a qualification at the same time!'

Reclaiming the heritage: ArtSpace

This was a joint project between a voluntary amateur arts group, the local arts council, the local authority adult learning service, and arts development services with a local professional artists' organisation, the Visual Artists Network.

The ArtSpace project transformed an empty shop unit on the high street in the centre of a priority neighbourhood. The shop offers arts-based learning workshops twice a day, and displays the work of local amateur and professional artists. Workshops have included: interactive music media, pastels in Provence, recycled crafts, canal art, jewellery and a collaborative mural developed over the three months of the project. Over half the people attending are over 50, and have no previous learning experience.

Learners have commented that 'ArtSpace brings the community together, the young and the elderly… it puts a heart into this historic town, shows other counties the beauty the region has in its community and local arts.' 'There is not enough chance for us everyday folk to see local artists.' 'ArtSpace is an absolutely wonderful idea to involve all family members.'

1. Connect… Talk with the people around you. Spend time with family, friends, colleagues and neighbours, at home, work, school or in your local community. Think of these relationships as the cornerstones of your life and invest time in developing them. Building these connections will support and enrich you every day.

2. Be active… Go for a walk or run. Step outside. Cycle, play a game, garden, dance. Exercising makes you feel good. Most importantly, discover a physical activity you enjoy and that suits your level of mobility and fitness.

3. Take notice… Be curious. Catch sight of the beautiful. Remark on the unusual. Notice the changing seasons. Savour the moment, whether you are walking to work, eating lunch or talking to friends. Be aware of the world around you and what you are feeling. Reflecting on your experiences will help you appreciate what matters to you.

4. Keep learning… Try something new. Rediscover an old interest. Sign up for that course. Take on a different responsibility at work. Fix a bike. Learn to play an instrument or how to cook your favourite food. Set a challenge you enjoy achieving. Learning new things will make you more confident as well as being fun.

5. Give … Do something nice for a friend, or a stranger. Thank someone. Smile. Volunteer your time. Join a community group. Look out, as well as in. Seeing yourself, and your happiness, as linked to the wider community can be incredibly rewarding and creates connections with the people around you.

The rest of this document explores how adult learning, in its various forms, can contribute to the well-being of older people.

5 *The role of adult learning*

What do we mean by adult learning?

Learning takes many forms, and happens in many ways. It may:

- be deliberate or incidental – individuals may set out consciously to acquire a specific skill, understanding or body of knowledge, or they may acquire these incidentally, in the course of carrying out an activity, job or task;

- take place in an institution dedicated to learning (a college, adult education or training centre), or in the home, a health centre, workplace, care home or community venue;

- be called a class or course, but may also be a meeting, a book group, a workshop, a group meeting in a pub to discuss a common interest, or a conversation between neighbours or workmates passing on skills or knowledge;

- be organised by a local authority, a college, a PCT or a voluntary organisation dedicated to learning (like the Workers Educational Association, or the U3A), or an organisation devoted to some other interest where learning is incidental (like an angling club, a Citizens Advice Bureau (CAB) or a church); or

- be paid for by the state, as an educational or training programme, or as part of another service. Alternatively it may be paid for by the individual learner or his or her employer.

Although most people are attracted to learning by a 'subject', this is often only one aspect of their motivation. Certainly many people start on a learning activity because they want to know more about a subject or develop a particular skill, and helping them to do this well is important. But learning is about more than just building knowledge and skills (the 'human capital' that enables us to earn our living and carry out our day-to-day tasks). It also develops 'social capital', the glue of social contacts which hold communities together, and provide support for each other; and 'identity capital', the sense of who we are and where we fit in the world, of self-confidence and of an identity built on our unique past and our aspirations for the future.

'I feel as though I'm improving every week. I feel more energetic.'

So people come to adult learning not only to acquire knowledge and skills, but also to meet people, to take on a new challenge, find a new interest, and keep themselves active. For some the subject is secondary to these purposes. It can be especially important for those whose lives have been disrupted by divorce, bereavement, or moving home. One does not have to declare a problem or say that one is lonely to join a class, which provides an easy way to

meet new (and different) people. In this way, it helps reintegrate people into wider society, and build links across social divides. It is therefore vital that when we seek to measure the benefits of learning we do not overlook the vital contribution that classes and clubs make to the broader well-being of their learners, and the communities in which they live.

Formal and informal learning

Formal and informal learning both matter. Formal learning, through structured classes, often with assessment, is easier for organisers. Because it happens in designated places and involves attendance, it is easier to plan, structure and measure. Informal learning, on the other hand, is less organised, but happens closer to where people live, making it more accessible to people who do not see themselves as 'learners'. Much informal learning happens without any explicit intention to learn, and learners have little interest in defining what they have achieved afterwards. This makes it difficult to identify and quantify. In informal learning, the roles of 'teacher' and 'learner' may be undefined, with the same person taking both roles within the same group or activity.

The government's 2008 White Paper The Learning Revolution sought to promote more informal learning, recognising how important it is for many people, in its own right, and as an access route to other kinds of learning. Developing informal options is also a way of responding to growing demand for learning when public resources are restricted.

For some people, informal learning is the best entry point – less threatening and requiring less initial commitment. Some people, having built their confidence and established their interests, may wish to move on to more formal kinds of learning, sometimes going on to formal qualifications. It is important that it is easy for those who want to do so to 'progress' in this way, but informal learning should not be simply seen or justified as an entry route to formal learning. This is especially true for older people who have left the paid workforce. For some, qualifications may represent a welcome challenge, an opportunity to test oneself, or a guarantee of quality, but for others it is an off-putting irrelevance.

Adult learning and wellbeing

Adult learning can contribute to all five of the Foresight 'prescriptions for well-being', and the government sees this as one of the key purposes of its informal adult learning strategy:

Connect with other people

Adult learning almost always involves contact with other people. Most involves at least one other person, and a lot is done in groups – through classes, clubs, work teams or voluntary organisations. Adult education services are perhaps unique among public services in their bringing people together to pursue an interest, across generations, social and educational divides. This connection with other people distinguishes them from most public services, which exist to solve a problem, providing the citizen, patient, customer or client with something they 'need', and from services like libraries and museums, which mainly provide for people as individuals.

Be active in some form

Almost any kind of learning involves activity of some kind, and we know that physical activity reduces depression, can delay the onset of dementia and extend lifespan. Physiotherapists, gym coaches, and keep fit tutors all help people to learn to be active, with direct benefits to their health and control over their lives. But for many people, and particularly the least active (who include some older people), the activity of walking to the club or class is itself a physical activity, and the routine of attending make it more likely to happen.

Take notice of the world around

'Taking notice' is the brain's equivalent of 'being active'. By definition, learning involves noticing new things, whether it is observing how one relates to a grandchild, or the wing markings of a bird. Every attempt to teach someone something involves saying, in effect, 'look at this, do you see how it is not quite as you thought?' 'See how the chisel bites the wood if you hold it like this', or 'see how the same sound can be spelled differently'.

Keep learning

The relationship between learning opportunities (of all kinds) and this 'prescription' is self-evident. Learning of any kind keeps the brain active; it has been shown to improve physical and mental health, and delay the onset of dementia in old age. For many people, even in the final stages of life, learning provides interest, a structure to life and a set of goals to work towards.

Give to others

Unlike much education for young people, most adult learning is cooperative, with learners helping each other, sharing problems and testing ideas on each other.

Some forms of adult learning take this much further. Recent years have seen a dramatic expansion of self-organised groups. The U3A model is a prime (though not the only) example, where groups gather to learn together, with members taking turns to teach, to learn and to research new topics. Such approaches provide an opportunity for people to use and demonstrate skills and knowledge that they have acquired over a lifetime, or to investigate new areas. In this way they not only give to others, but strengthen their sense of self and their role and status within a community.

Learning for the Fourth Age (L4A)

Learning for the Fourth Age (L4A) is a not-for-profit social enterprise that provides educational and learning services to residents of care homes though one-to-one teaching sessions with trained volunteers, complemented by some group learning activities.

L4A provides residents with personal learning mentors who spend time with them each week sharing ideas, information, materials and audio visual resources and stimulating their minds. Activities are designed to suit the individual's interests and needs and one-to-one sessions are backed up with materials to use between sessions. By working with learners on a one-to-one basis, L4A is able to work around the support needs of individual learners and their particular circumstances, and the personalised service also helps learners to explore interests they may have felt too shy to express in a group setting.

To date, learning activities have included ancient Roman history, theology, piano, knitting, watercolours, watching and discussing ballet, learning Russian, singing, and IT. The use of young volunteers has enabled residents to pass on their skills and knowledge to their younger learning mentors. In order to complement their wider activities provision, ongoing support is also provided for volunteers through monthly social and training meetings and through a volunteer coordinator, and the service has been commended by the Care Quality Commission.

6 Leading development: the local authority and its partners

The local authority is the key player in promoting the well-being of people in a given area. It is democratically accountable for the quality of services, and has statutory responsibilities for the welfare and well-being of its population. A range of national performance indicators measure aspects of its achievement. The creation of the new role of lead accountable body for informal adult learning gives the local authority an additional emphasis.

As the Audit Commission pointed out in *Don't stop me now*, the responsibility for age policy goes well beyond the provision of social care for the most dependent. It includes strategies to help people to remain independent, but also includes enriching the quality of life through museums, libraries, galleries and sporting activities, and through the promotion of activities that build social capital and strengthen bonds between neighbours, cultures and generations. The evaluation of the Partnerships for Older People Project programme[4] demonstrated how collaborative working between local authorities and primary care trusts (including adult learning programmes) can improve the quality of life for older people, at the same time as making major savings in public expenditure.

'I've had two falls recently and because of this, every week I'm regaining my mobility.'

The NIACE policy paper, *Older People's Learning*, proposed that the local authority should lead the development of learning opportunities for older people, but that it should work in partnership with the broad range of other agencies. They include the health services and providers of financial advice, as well as voluntary organisations and service providers like Age UK and Citizens Advice. In any given area there will be many others, including a range of education providers in the public, private and third sectors.

Many of these agencies have no explicit 'educational' purpose; much of the learning will happen, whether or not a public body knows about it; and some groups will actively resist outside interference. However, a partnership approach will make it easier to develop a coherent range of opportunities for all.

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4   A joint programme where Local Authorities and primary care trusts (PCTs) jointly developed innovative approaches to reducing admission to hospital and residential care.

Exploring opportunities: the Later Life Expo

The Later Life Expo was an event for all residents over the age of 50, to raise awareness and encourage learning about the opportunities and entitlements available to older people across the county.

The free event provided information, advice and learning on all aspects of healthy living, home safety, and health and fitness, with workshops and live demonstrations presenting ideas and motivation, plus the chance to join in activities. It was arranged in partnership and featured over 50 exhibitors (commercial and not-for-profit) covering a wide range of topics from gardening, arts, crafts and leisure, cooking and travel to further education, health, transport, benefits and pensions, plus much, much more. The county council organised the event and showcased the benefits of council services, specifically prevention and adult community learning.

Visitors learned how to sow vegetable and flower seeds, cook a healthy meal on a budget, try cricket, badminton, table tennis, orienteering, keep fit classes or line dancing. They could try watercolour painting or see how they could improve their DIY skills.

Over 11 hundred people visited the one-day event, leaving with the knowledge of local organisations, activities and services they offer.

The 'leadership' role which we propose for the local authority therefore needs to be 'light touch'. Its aim should be to include all relevant agencies, and make it easy for those offering learning opportunities of all kinds to talk to each other, about how to develop their offerings and relate them, where appropriate, to other agencies' work. Such arrangements may take a variety of forms, including formal consultative or governing committees, local strategic partnerships and learning partnerships, but also much less formal mechanisms, and groups convened to address particular issues.

Where does responsibility lie in a local authority?

Local authority involvement in adult learning is two-fold. The first, and best known, is as a discrete 'education' service, providing classes for adults in a wide range of subjects. Similar courses are also often provided through libraries, museums, galleries and leisure services. Other departments, like health and social care, the police, fire services and planning have a public education dimension to their work, although this is often not connected to the more explicitly 'educational' services.

Until the creation of children's services directorates, most discrete adult learning services were located in education departments. Since then there has been much movement. A recent NIACE survey found that while 40 per cent of authorities located adult learning services in the children's services directorate, the other 60 per cent placed it in a range of directorates, with a wide range of titles. The most frequently recurring words in the names of those directorates were:

- adults;
- communities;
- neighbourhoods;
- culture;
- environment;
- regeneration; and
- health and well-being.

This diversity indicates the variety of policy areas where adult learning makes a contribution. Two of the largest and most successful services examined were located in corporate resources within the chief executive's office, indicating its potential strategic role.

The *Learning Revolution* and the lead accountable body

The 2008 White Paper The *Learning Revolution* identified, for the first time, the importance of informal learning for adults, recognising that much of the most important learning in people's lives happens outside the scope (and sight) of formal educational institutions, and that in a time of shrinking public resources and growing demand, one priority must be to find more effective ways of supporting voluntary and private effort.

As part of this strategy, the government has consulted with local authorities, who were keen to take on strategic and operational leadership of informal learning, in order to:

- improve coherence across services to support family learning, citizenship, mental and physical well-being, health, culture, environment; and
- engage disadvantaged groups and integrate informal learning with their wider, local agendas for community and economic well-being.

This strategy is entirely consistent with the approach proposed in the current paper, and one result of this consultation has been the creation of lead accountable body status. Under this status, central government funding for informal learning, which was previously channelled to local authorities and further education colleges through the Learning and Skills Council, would be directed to authorities. As lead accountable bodies, these authorities would:

'It gets easier every week, so it must be working!'

- provide the vision and leadership to innovate by promoting a culture of learning through life, which will help widen access to learning and skills;
- target public investment and encourage collaboration;
- lead a strong local partnership ensuring participation across a wide range of organisations with a diverse offer to meet local needs;
- propose annual jointly agreed delivery plans that will form the basis for the funding agreement with the new Skills Funding Agency;
- ensure the local plan secures value-for-money and levers in additional resources from fees and other sources;
- moderate plans at a sub-regional level (where a number of local authorities have agreed voluntarily to form a sub-regional cluster).

This strategy gives authorities a clear strategic role and resources to support it. The remaining part of this paper aims to help them to do this in relation to older people.

7 Learning and well-being: a framework for assessing opportunities

Most of the underlying learning needs of older people are common to older people anywhere. It is the way in which these needs are met, and the prioritising of those needs, which will vary and are a matter for local authorities and their many partners at the local level.

In carrying out its duty to secure well-being, the local authority needs to know what is available, in order to help identify unmet needs, or opportunities to support improvement, but it must not seek to impose inappropriate constraints (of inspection, accounting or reporting) on autonomous agencies.

The framework below offers a way of describing the range of opportunities which an older person might need or hope to find in any given area. It is designed to help local authorities and their partners to review the range and quality of opportunities available (from all sources) for older people to learn in their area.

This does not presume that all these activities should be either provided or funded from the public purse, nor that any particular agency should provide any particular kind of opportunity. Such decisions are properly made at the local level, and will vary from place to place. What matters is that they are available in appropriate forms to the people who need or might wish to take part in them.

Five principles

In using the framework, the following principles are important:

Inclusion: No older person should ever be prevented, merely on the grounds of age, from doing anything available to younger people (this is unlawful unless there is a clear justification[5]).

Choice: No older person should be obliged to do anything – but neither (at least in an ideal world) should they be unable to do something important because it is not available.

Diversity of provision: No single agency can, or should, attempt to provide all the services required. Any provision that meets all the learning needs is bound to be provided by a range of agencies – educational, health, financial, social, public, private and voluntary – and there will need to be appropriate arrangements for collaboration between them, to share expertise, and support progression between agencies and programmes for those who wish to do so.

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5   See Age Discrimination and Adult Education Fees: A Briefing Paper (NIACE 2008).

Diversity of approach: No single form of delivery will meet all needs for all older people. Different approaches to learning (formal/informal, face-to-face and distance, in a group or on one's own, embedded in other services or as part of a commercial relationship) may be appropriate in different situations, and for different learners.

Diversity of outcomes: Individuals bring different motivations to the same activity, and leave with different outcomes. Measures of success and funding systems need to recognise that there is rarely a simple one-to-one relationship between the stated purpose of an activity and the benefits it brings to each learner and to the communities in which they live.

The Framework

Since the outcomes of much of the learning we seek to promote is not well described in course titles, this framework is not presented in terms of 'subjects' or 'content'. People learn and connect with each other in book clubs, tenants groups and angling societies, and through classes in French, parenting, or woodwork. Consequently, we describe a set of broad areas, inviting all the relevant agencies, public, private and voluntary, to consider together how adequate the whole offer is in their area, and how it might be improved.

The framework is presented as a list of objectives, and partners may find this useful as an agenda for discussion. We suggest that an adequate range of opportunities in an area will include activities that address all of them. However, the areas overlap, and they are not all alike. The same class, group or activity may address several of these areas and within any given group different individuals will have come for different reasons.

Preventing falls

Following a successful project to give older people the skills to make and broadcast radio programmes, the local authority set up a partnership to tackle the problem of old people and falls. Falls damage the well-being of many older people and cause substantial costs to health and social services. The partnership included colleagues from health improvement, PCT, adult education, a local voluntary sector group and a community media company. It produced:

● an education programme for older people identified as at risk of a fall. Occupational therapists, adult education tutors and health improvement workers ran sessions in the local leisure centre aimed at helping older people improve leg strength, balance etc.;

● a programme of exercise activities, of which the most popular, Tai Chi, became a self-funding and self-sustaining group with upwards of 70 people regularly taking part in sessions in local community venues; and

● a DVD to educate other older people about falls. The production was led by a group of older women, supported by a local community video production company, a third sector informal learning provider, and adult education and health improvement team members. It carried messages about the dangers of falling and promoted a range of activities to improve health and mobility.

Area	Objectives of learning	Partners Which agencies / partners are involved, and what policy drivers affect them?	Range What opportunities are available?	Adequacy How adequate is the range, scale, quality and accessibility of opportunities?	Well-being How well does this address the five well-being objectives?	Participation Do the opportunities reach all groups who might benefit?	Change How are needs and expectations changing?
1. **Managing transitions**	To prepare for and respond positively to major life changes, including retirement, moving, loss, bereavement, and death.						
2. **Getting involved**	To encourage and support people to play an active role in their communities.						
3. **Accessing the digital world**	To enable people to make effective use of current and emerging technologies, in order to maintain independence, access information and sustain social networks.						
4. **Managing Caring**	To enable people to carry out their caring responsibilities for partners and others, and to provide personal support in managing the pressures of such roles.						

5. **Maintaining** **health**	To help people to maintain their physical and mental health.					
6. **Ensuring** **financial** **security**	To ensure that people understand and can manage their personal finances, and avoid being exploited by others in later life.					
7. **Maintaining** **employability**	To encourage and enable people to extend their working lives, through paid and unpaid work, and to improve the quality of those working lives.					
8. **Developing** **interests,** **curiosity and** **knowledge**	To enable people to take up, develop and maintain interests and creativity across a range of fields.					
9. **Cultural** **engagement**	To enjoy, understand and contribute to a diverse, shared and evolving culture.					
10. **Maintaining** **basic skills**	To ensure that people have, and can, maintain the basic skills of language (including English for speakers of other languages), literacy and numeracy, they need to manage their changing lives.					

8 Developing a strategy for older people's learning: issues to consider

Who participates?

Opportunities to learn are not evenly distributed across society. Broadly, those who have had the most previous education are most likely to get more later in life. This is particularly true for older learners, since many people over 50 today left school at 15 or earlier. However, too many people believe that education is 'not for people like me' or that they are too old to learn[6]. Financial, cultural and physical barriers make it more difficult for some to take part than others. A key question in reviewing provision is how accessible opportunities are to all older people, and how they are promoted.

How do people find opportunities to meet their needs?

One reason why people take part less than they might is that it is difficult to find the most appropriate opportunity to meet particular needs of interests. A range of information and advice services have relevant knowledge, but they are often not well coordinated.

'I want to join more courses now I know how enjoyable it is.'

Three initiatives can contribute to this: the 'one stop shop' services for older people being developed under the Age White Paper *Building a Society for All Ages*; the new Adult Advancement and Careers Service, to be launched in the summer of 2010; and the new role of lead accountable body for informal learning, which local authorities are being invited to take on. It will be important to ensure that the three are linked and informed by more local sources of information and advice.

Balancing targeted and universal services

Older people are no more alike than any other group, and they only become so if they are deprived of opportunities to continue to develop. One test of the adequacy of provision in any area is the diversity of needs which it meets.

Within a very diverse population there are some groups with particular needs that will not be met without a degree of targeting. Although traditional 'adult education' programmes have always recruited across a wide social spectrum, there are many who see it as 'not for people like me', for whom promotion, location and teaching approaches will need to be specially tailored.

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6   There is little evidence that most people's ability to learn declines significantly until late old age. See Withnall et al (2004).

A new learning adventure

The *New Learning Adventure* links Lancaster University to members of Lancaster and Morecambe U3A. No prior knowledge is required, and the programme offers a range of activities. Through the Open Lecture programme, U3A members can attend lectures in the university's undergraduate degree programme. The Department of Continuing Education organises learning circles, facilitated by U3A members, to bring together older people who have been attending lectures to discuss what they have been learning, hear about the lectures that others have attended, and get support for planning further reading and research. Lunchtime talks and discussions provide a chance to hear about cutting edge research from the university's senior academics, researchers and PhD students. Members are provided with information about public lectures and seminars, and they have access to the university library and the virtual learning environment which enables them to engage in online discussions on the subjects they have been studying.

However, it would be a mistake, even when funds are short, to think that targeted services should be the only priority. Exclusion and disadvantage take many forms, some of them hidden. While some people will only respond to opportunities designed for a very specific group (like a particular neighbourhood, or people with a particular medical problem), for many the opportunity to step outside the confines of the 'target group' is an important part of the attraction and challenge of learning. Universal services can more readily bring people together across generations, and provide unobtrusive support to people before their problems become critical, reducing the need for more targeted services, just as public health programmes reduce the need for medical intervention.

Involving older people in service design and delivery

A key principle of government (and good adult education) policy is that programmes should be designed with, and not simply for, older people. However, this poses problems about the nature of consultation and representativeness. Most older people, particularly perhaps those in their 50s and early 60s, do not wish to be pigeonholed as 'old', and wish to be seen as citizens, workers, learners, volunteers etc. rather than 'old people'. As a result, they may opt out of consultation about services that might benefit them, while those who undertake research into older people's needs and aspirations may not themselves be old.

Linking services and policies

What is the best way of managing the relationships between partners, bearing in mind that agencies will vary greatly in the time and resources they can commit to the learning needs of older people. Relevant partners, with differing needs and priorities, will include:

- departments and services within the local authority – social care, adult learning, libraries, transport etc.;
- other public sector bodies – primary care trusts (PCTs), government offices, regional development agencies (RDAs) etc.;
- voluntary/third sector agencies – both age-related agencies like Age UK or U3A, and general like CAB, Workers Educational Association (WEA) or Women's Institute (WI); and
- private sector agencies and providers – including a host of individuals providing teaching in particular (sometimes highly specialised) areas.

Supporting partnership

Developing and maintaining partnerships, building a diverse range of opportunities and monitoring success all take time. This implies some staffing to carry out these functions, and such staff will need good skills in partnership building as well as policy development and implementation.

The role might be given to staff who have traditionally organised 'adult education', or with the local strategic partnership. What is critical is that the person responsible is sufficiently senior to engage with the major policy developments in many services, and perceived to be impartial between potentially competing agencies and services.

Developing and sharing good practice

Different agencies have different skills, knowledge and experience of providing for and supporting older learners. The overall range and quality of opportunities will be strengthened if these can be shared between partners, and the opportunities for older people will be improved if the partners in an area are familiar with each other, their services and policies and ways of working. One important function of the lead agency should be to find ways of encouraging such collaborative learning, always recognising that each partner will have its own priorities and will wish to protect its unique features.

Promoting and publicising learning to older people

Many older people face significant obstacles as they embark on learning, including practical issues like access to public transport and information, as well as the affordability of courses. It is therefore important that publicity communicates the impression that older learners are welcomed and valued.

The 'signatures' project

Bengali residents of Mosque Tower Sheltered Housing Scheme and members of the Deesha Literacy Project have joined in an eight-week pilot project to help residents develop their written signatures and learn to print their names. With guidance from an English teaching volunteer, younger women from the Deesha literacy project share their own experiences of informal literacy learning, provide emotional and physical support to older learners and directly assist their learning. Deesha members have developed not only their English language skills, but have also gained confidence and become more active in the community, with many volunteering for the first time. A number of members have also met with a worker from a home care agency as part of the project, and are now confident about applying for work in home care. For the older women, who have been isolated socially and educationally, the opportunity to learn with support and inspiration from other women who have taken part in informal literacy learning, has been of great value.

Some older people, and especially the oldest, are less likely to use traditional access channels, such as the telephone or the Internet to access information and prefer to receive information face to face. This is especially important for 'hard to reach' groups, such as members of black and ethnic minority groups, the housebound and the rurally isolated. Many older people also prefer to respond to someone 'official' who they can trust, which is one of the reasons why some authorities have set up village agents schemes, to provide face-to-face signposting, information and advice on local amenities, groups and facilities for older people. Face-to-face information can appear more 'personal' and responsive to an individual's needs. Word of mouth communication through family and friends is also effective, and can reduce the risk of social exclusion.

A high proportion of older people watch TV and read local newspapers, and radio is another useful tool, although older people tend to favour BBC channels over commercial radio stations, as they don't carry advertising. Many older people also prefer official information in hard copy, although it is important to consider style, colour and imagery, as well as content, to ensure that such material is physically manageable, accessible to those with a visual impairment and does not offend or patronise.

Fees and charges

How much people pay for learning varies very greatly according to activity, sponsor and sometimes individual circumstances. Some activities are free, others very expensive, and some have reduced charges for particular groups, including people over 60 (which can still be legal under the age regulations).

What is the rationale for charging for particular services? How do charges relate to costs and benefits to the public and private purse? How far is it possible to adopt a consistent and equitable policy that reflects the social and individual benefits across agencies (bearing in mind the constraints of funding sources)?

Securing access to premises

This is a major issue for many third sector organisations and for self-organising groups. U3A has regularly expressed concern about this, and the BIS work on the Learning Revolution White Paper is exploring solutions and good practice. There is no doubt that there are many public buildings with unused space at some times of the day or week which could be available for learning groups. However, the problems of access, heating, lighting and security are serious, and overcoming them can be expensive, especially when buildings are rarely designed to open a small area for a single group. In the long term, this is an issue for the design of new public buildings.

Managing transitions

Transitions like retirement, divorce, redundancy, bereavement and moving house are traumatic for anyone, and become more so as people age. Many people embark on some form of learning as a way of re-establishing a new identity after such life changes. Often (though not always) this learning is not explicitly about 'managing change'.

'At 81 I found uni very different from college and, particularly this year, quite taxing. However, I haven't failed anything yet and I am hoping this will last now I am in my third year. I finish at Christmas, but haven't decided what to do next.'

One key transition is retirement, which is often as major a life change for older people as entering the world of work is for young people. Yet most have few opportunities to prepare formally. Pre-retirement education, where it exists, is generally provided to those employed by large organisations with substantial human resource budgets, and often concentrates mainly on financial issues.

Many people would benefit from an opportunity for guided reflection on their aspirations, circumstances and needs, to think about planning for what is, for many, 20 or more years of active life after work. This will include consideration of issues including health, finance, where to live, constructive activity, and managing care responsibilities (which many people face in their 50s and 60s, having to care first for their parents and then later for partners).

Working across generations

One consequence of an ageing society may be increasing divides between the young and old. Learning can help bridge such generational divides, by bringing people together to learn, from and with each other. This can help older people to maintain connection with wider society; it can reduce intergenerational tensions; and it can help to transmit skills, knowledge and understanding between generations. Intergenerational work between schoolchildren and care home residents has frequently proved rewarding for both parties.

Learning in care settings

Learning can make a dramatic difference to the quality of life for people in residential and day care settings. It can provide mental and physical stimulus; a sense of purpose; something to look forward to and a sense of challenge. Care homes that offer learning activities report dramatic improvements in social engagement, levels of depression, sleep patterns, and medication levels.

9 *How to monitor and evaluate?*

Monitoring and evaluation of services is important, as a base for assessing the range, access and quality of what is available, to promote improvement and to justify public support in difficult financial times. It is clearly important that partners in an area, and particularly the lead accountable body, have adequate information and analysis of what is available, and how good it is. However, within a partnership this needs handling with sensitivity; many agencies (and particularly the most informal) will resist any attempt to impose external requirements for data collection, and may withdraw cooperation if the data collection systems are seen as intrusive or inappropriate.

In monitoring the impact of a strategy, there are at least three kinds of relevant data which can help build a more 'three dimensional' picture of the quality of services.

Monitoring data

Agencies which provide formal classes collect data on numbers of participants and their achievements. They also usually collect some information about their background, which can help to assess the coverage of services (are some areas, or kinds of people, underrepresented), and they also usually collect data on levels of satisfaction. This is important, but does not tell us anything about informal learning, much of which cannot be described in terms of hours of attendance, or formal outcomes. There will also be organisations that collect data but are unwilling to share it because they wish to protect the privacy of their learners, retain their special identity or protect commercial interests. Monitoring data will therefore only reveal part of the picture, and will conceal some kinds of change (like a move of learners from formal to informal programmes).

Survey data

From time to time, agencies collect data on learning using wider definitions. These agencies ask a sample of the population about their learning experiences, sometimes using very broad definitions, which capture informal as well as formal activity. These include the annual NIACE Adult Learners' Survey, and the National Adult Learning Survey, and the Skills for Life Survey, which are conducted every few years. The Labour Force Survey collects data quarterly, and includes a series of questions about different kinds of learning. These surveys can reveal more about patterns of learning, and movement of activity between formal and informal programmes. However, they are national surveys, and only the Labour Force Survey can produce data at the level of an individual local authority area.

A second kind of survey examines the broader issues of well-being and life satisfaction. The Place Survey tells us what people say about satisfaction with specific local services, and general well-being, and the general performance of their local authority[7]. However, it does not focus on learning issues, and it would be difficult to relate levels of well-being to the provision of a particular kind of opportunity. The European Social Survey, on the other hand, explores well-being issues in much more detail, but because of sample size, the results cannot be analysed below regional level.

Research data

From time to time, government departments and academic researchers carry out studies to research particular aspects of age, learning, health, well-being and satisfaction with public services. Interview-based studies can be tailored to answer much more specific questions about individual expectations, aspirations and experience. In the NHS, social marketing techniques are used for this purpose. However, such studies are expensive to carry out, and tend to reflect the particular interests of the funder, which means that they rarely answer precisely the question that a local authority or learning partnership might want answered.

Reaching out to rural areas: Village Agents

Village Agents provide face-to-face information and guidance to 'hard to reach' groups, recognising that the growing population of older people in rural areas is less likely to access services through traditional routes. The areas selected for the Village Agent project were chosen after consultation with stakeholders and a review of existing facilities, such as access to GP surgeries, libraries, a post office or corner shop. Agents contact older residents, providing customers with the opportunity to learn about services and local activities in an informal way, and making referrals to statutory, non-statutory and third sector organisations where required. They also provide sign-posting, information and advice on local amenities, groups and facilities, and arranging community transport.

The Village Agents, who are recruited locally and have local knowledge, are in constant contact with local organisations and service providers to keep up to date with new opportunities.

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7   This data needs careful interpretation, since it will be greatly affected by individual circumstances and knowledge, and how important the issue is perceived to be by the particular individual.

10 *Learning and other local government priorities*

Since learning is one of the things that defines us as humans, it is not surprising that many current initiatives in local government and public health have a learning dimension. The list below includes some of them. In each case, learning can help deliver the objectives of the policy, sometimes increasing efficiency or reducing costs. The question for a local authority is how well the learning elements are being managed to support the initiative.

Some current initiatives affecting older people include:

- choice and personalisation
- community empowerment
- democracy and local engagement
- dignity and respect
- early intervention and prevention
- health equalities
- healthy communities
- more with less
- national strategies for care, dementia, carers, and safeguarding vulnerable people
- neighbourhood renewal
- putting people first
- social cohesion
- social mobility
- strong, safe and prosperous communities
- sustainability
- total place and place shaping
- well-being
- working neighbourhoods

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