



Policy and Provision in Education and Training for Victoria's Ageing Population

PAPER NO. 5 NOVEMBER 2005

Published by Research and Innovation Division
 Office of Learning and Teaching
 Department of Education and Training
 Melbourne
 November 2005

Also published on <http://www.det.vic.gov.au/det/about/research/default.htm>

© Copyright State of Victoria 2005

This publication is copyright. No part may be reproduced by any process except in accordance with the provisions of the *Copyright Act 1968*.

Authorised by Department of Education and Training, 2 Treasury Place,
East Melbourne, Victoria, 3002

Address inquiries to:

Research and Development Branch
Office of Learning and Teaching
Department of Education and Training
Level 2, 33 St Andrews Place
GPO Box 4367
Melbourne 3001

Email: research@edumail.vic.gov.au

Authors

John Fischer, Sue Foster, Julie McQueen

Project Management

Sandra Mahar

Editorial Staff

Sandra Mahar

Contents

Summary of Key Points	1
Introduction	2
The Context	3
What do we know?	3
Adult education, training and learning	4
Pedagogy	5
Adult learning v. lifelong learning	5
Benchmarking Victoria	7
The older learner, in summary	7
OECD Benchmarks	7
Participation	9
Attainment	10
Literacy levels	14
Reasons for adult learning	15
Mode of provision	16
Public vs private expenditure	17
Reasons for not participating	17
Teaching and learning for adults	19
Background and context	19
Learning and teaching	22
Teaching and training	22
How is curriculum organised?	24
Implications for policy for older peoples' learning	25
Challenges	26
Further research	26
Learning for the 45 and over population	26
Lifelong learning	26
Support for policy choices	26
References/Further Reading	27
Acronyms	28
Table of Figures	29

Summary of Key Points

The ageing of the population is likely to lead to the extension in working lives as well as extending lives post work.

Do older people merit particular consideration in education and training? Are there needs and perspectives that require a specific response? The answer is yes and no. The no is that many have the resources and desire to manage effectively. However:

- increased longevity means that a lengthier post work period is likely to present unexplored social and cultural outcomes. Learning improves life's quality plus there are new health, financial management and technological challenges to be met; and
- there may be a need to offset the impact of major structural change in the economy on individuals at risk, or who need to extend their working life, often in unfamiliar jobs.

Victoria meets most of the Organisation for Economic Co-operation and Development (OECD) principles with a range of relevant policies and programs in place, and some flexibility in provision.

Extension of working life and post work life are embedded in a complex web of policies that interact in sometimes complementary and sometimes contradictory ways. Age discrimination in the labour market, and the mix of policies impacting on decision making and motivation (retirement, superannuation, taxation, income support, welfare and education policies) hinder participation in education. Changes in society and the economy mean that policy frameworks posited on linear, discrete life stages are inadequate. A 'life course' framework understood in terms of transitions into, within and out of the labour market is necessary. Understanding the education and training requirements of older Victorians would benefit from such an approach – to meet labour supply issues, and enhance social cohesion and inclusiveness.

A research need is identified in the policy literature and categorised as follows:

- Learning for the 45 and over population - the how, why, where and who of it.
- Lifelong learning - skills and knowledge required for the 21st century; learning to learn skills commencing in foundational education; school retention; significant life transitions.
- Support for policy choices - information and data collection on participation and spending including where and by whom; research into and sharing of best practices at a national and international level.

Introduction

This report represents selected extracts from a major research project commissioned by the Office of Learning and Teaching. The project presented an understanding of the ramifications for learning and teaching of an ageing population in the context of the kinds of demographic, economic and social changes under way or expected with a particular focus on the population aged over 45 years.

This purpose of the project was to:

assess the alignment of adult learning policy and provision in Victoria with expressed government priorities;

build on the OECD's study *Beyond the Rhetoric: Adult Learning Policies and Practice* by examining existing adult learning policies and provision in Victoria, and comparing them against the findings and recommendations of the OECD report; and

develop priorities for policy development and further research in Victorian adult learning provision.

Selected extracts from each section of the project are included in this report.

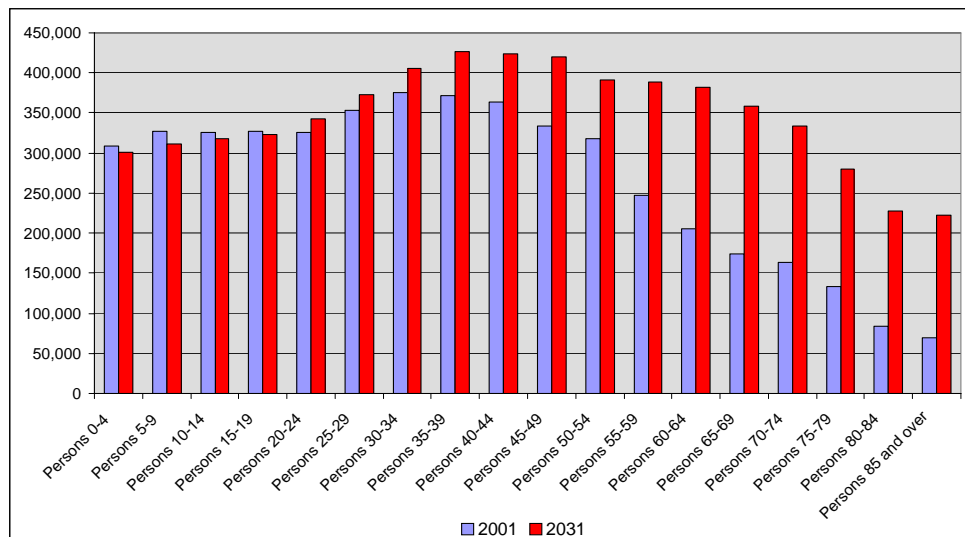
The Context

What do we know?

The following is generally agreed in the literature:

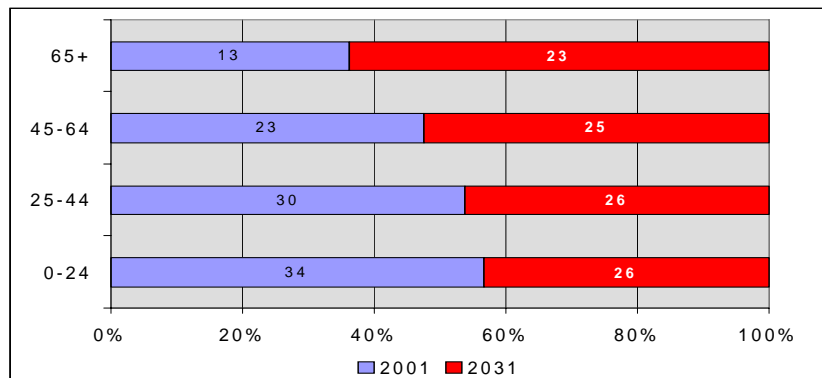
- The population is ageing due to the 'boomers', increasing longevity and decreased fertility. The proportion of the State's population aged 60 years and over increased from 14% in 1981 to nearly 17% in 2001. By 2021, one in four people in Victoria will be aged 60 years or more. This means an increase of more than two-thirds, from around 820,000 in 2001 to approximately 1,400,000 people in 2021 and 1,600,000 in 2031. This should not be seen as a problem, but it will give rise to economic and fiscal impacts that pose significant policy challenges.

Figure 1: Population change by age group Victoria 2001 & 2031



Source: Department of Sustainability and Environment

Figure 2: Age groups as a percentage of the Victorian population, 2001–2031.



Source: Department of Sustainability and Environment

- The rate of increase of seniors in rural and regional areas of Victoria will be twice that of metropolitan areas.
- There is a general tendency for women to outnumber men in the older age groups.
- The older one is, the less schooling (length of time) one has and lesser post school qualifications one has.
- The proportion of over 45s varies between people from different birth regions, those groups involved in earlier immigrations being older.
- People 45+ are more likely found in manufacturing, health and community services and education industries.

The only thing not in dispute in the matters under investigation is that the population is ageing. There is little agreement on the implications of this for policy.

Developing a workforce of lifelong learners, and enhancing the role of the workplace as a key learning environment can be seen as a key aspect of a strategic response to the ageing of the population – at least to meet the needs of the older cohorts and possibly the economy overall. There is also some agreement that transition policies are necessary which may involve education and training, including for those mature adults not in the labour force, but more importantly require other policy initiatives.

Extension of working life and life transitions are embedded in a complex policy web in which labour market policy, health and welfare policy, taxation policy and education and training policy interact in complex, complementary and contradictory ways. It would seem that education and training have a key but secondary or subsequent role in this. It is firstly a challenge for economic, industry and social policy generally. What is the leadership role of education authorities in pursuing these issues?

Although there is general agreement that policies and measures for older person's transition policies are required, the grounds for this differ in important ways which would impact on the shape of policies and measures. Some argue for programs to extend working lives to relieve increased budget pressures, make services accessible to older people and to offset reducing participation rates and labour supply; others finding those views too deterministic, argue that there will be no budget issue because incomes and productivity will rise, that participation rates will not decline because of the flow through of higher female participation rates in younger age cohorts, and the fact the older age cohort participation rates have not diminished. Even the dependency ratio will not reach the levels of the 50s and 60s. In this view transition policies are required, less for labour supply reasons but on the grounds of enhanced social cohesion and inclusiveness.

Adult education, training and learning

A number of issues arise from the above. Why should older people merit particular consideration? Are there needs and perspectives which require a specific response to people 45+? The answer seems to be yes and no.

The numbers and thus the visibility of older people in the population have increased. Increased longevity means that the post work period is likely to be lengthy and present as yet unexplored social and cultural outcomes. New learning may intrinsically be a factor in a better quality of life plus there is a range of issues – physical and mental health, financial management, technological literacy – for people to cope with.

Research suggests that learning plays an important role in empowering individuals to better manage life transitions such as bereavement, realisation of social or personal change and major relocations.¹

There may be a need to offset the impact of major structural changes in the economy and employment on individuals who have lost or are at risk of losing their occupations or longstanding jobs, or who wish to extend their work life.

Apart from personal benefits, learning opportunities for older people can benefit the community as a whole and more directly reduce pressure on their families by improving well-being and networks of social support.

Pedagogy

Debates rage about whether there are important differences in the ways adults learn compared to children. The emerging consensus view is that people regardless of age require a range of learning contexts and that differences on the basis of age can be exaggerated. However, some discern capacities observable chiefly in adult learners.² In a non-compulsory education and training environment, motivation for learning is clearly important and its implications for adult learning probably needs to be better understood in all education institutions and systems. The extrinsic element in motivation may have more to do with what education providers do than intrinsic factors. It is important to see beyond the inspirational rhetoric that often surrounds discussions about adult learning and gain a better understanding of how adults actually experience learning. In policy making we also need to understand that education can be mandated but learning cannot.

Adult learning v. lifelong learning

The notion of lifelong learning has received recent impetus because of a perceived need to offset the impact of major structural changes in the economy and employment on individuals who have lost or are at risk of losing their occupations or longstanding jobs.

If we accept adult learning as part of lifelong learning we need to also accept that it remains an undefined concept which is part of a debate about the relative responsibility of the state, the company and the individual.

What appears to be agreed is that motivation to learn depends in large part on previous, including foundational, learning experiences. Therefore, concern about adult learning necessarily involves concern about lifelong learning.

We also know that health is positively correlated with years of formal education, and years of formal education are inversely correlated with cognitive decline in old age.³

¹ Schuller, Tom. Bynner, John. Green, Andy. Blackwell, Louisa. Hammond, Cathie. Preston, John. Gough, Martin (2001). *Modelling and Measuring the Wider Benefits of Learning-A Synthesis*. Centre for Research on the Wider Benefits of Learning, Institute of Education, Birkbeck College

² See for example Brookfield, Stephen, *Adult Cognition as a Dimension of Lifelong Learning*. To be published in *Lifelong Learning: Education Across the Lifespan*. Eds. J. Field & M. Leicester. Philadelphia: Falmer Press (forthcoming). These strands are: the capacity to think dialectically, the recognition that specific situations make nonsense of general rules or theories and is something that is learned developmentally; the capacity to employ practical logic, focuses more on adults' capacity to think contextually in a deep and critical way; the capacity to know how we know what we know ie the capacity to be self-consciously aware of one's learning style and being able to adjust these according to the situation; the capacity for critical reflection, the process by which adults become critically reflective regarding the assumptions, beliefs and values which they have assimilated during childhood and adolescence.

³ Schuller et al op cit

In *Where do Australian adults learn?*⁴ John McIntyre notes other learning contexts are as significant to adult Australians as educational institutions. This diversity of preferred learning resources implies that it is limiting to consider learning pathways purely as pathways from one institution to another or one course to another, without acknowledging the variety of means by which adults might come to formal learning. It may also be that a 'pathway' that starts from a need to learn something will differ according to what type of subject matter is involved. Age, gender and income related factors do influence people's preferences for modes and contexts of learning and further research might explore what learning contexts are preferred by particular clienteles.

⁴ McIntyre, John (2003). *WHERE DO Australian ADULTS LEARN?* Report and analysis by, Research commissioned by Adult Learning Australia. Survey questions developed by Dr John McIntyre & John Cross for inclusion in an omnibus survey conducted by A.C. Nielsen

Benchmarking Victoria

This chapter is concerned with describing and discussing education, training and learning for and by older Victorians, participation patterns and issues concerning curriculum and learning. One of the purposes of the project was to compare Victoria's policies with the widely accepted principles for adult learning outlined in the OECD's *Beyond Rhetoric*⁵, and the chapter also includes observations on that issue.

The older learner, in summary

- will increase as a share of the population over the next three decades, particularly in regional Victoria;
- is less likely to participate in education and training than are other age groups, but participation has increased over the past decade in both VET and higher education;
- largely participates in VET for foundation skills for life, skill improvement and personal development. They tend to participate in short skills grabs rather than full courses;
- has attained at least Year 12 at a level lower than the mean of OECD countries, yet the proportion of older Australians who hold a non-school qualification increased in the decade from 1994-2004;
- tends to participate in campus based provision at around the same level as other ages except for those aged 65 and older who access a broader range of delivery modes including online and remote access; and
- is less likely to use a computer or the internet at home than are other age groups.

OECD Benchmarks

Beyond Rhetoric: Adult Learning Policies and Practices provides an overview of the adult learning policies and practices within OECD participating countries⁶ and concludes by identifying a range of desirable features that make for successful adult learning systems. It draws heavily on background reports and country notes as well as information gathered through country visits, and is the final exercise of the first round of a thematic review commenced in 1999. The features identified in the report that make for successful adult learning systems provide a useful benchmark for this scoping exercise.

These principles can be summarised as:

Adopting an integrated approach can address a diversity of issues concurrently

- Helps governments to improve adult learning opportunities, to raise the efficiency and quality of adult learning provision and ensure better coherence in the delivery of learning.

⁵ *Beyond Rhetoric: Adult Learning Policies and Practices*. OECD (2003)

⁶ Nine countries took part in the first round: Canada, Denmark, Finland, Norway, Portugal, Spain, Sweden, Switzerland and the United Kingdom (England).

Make learning more attractive to adults

- Pedagogical methods suited to adults rather than the young. This implies learning that is learner centred and contextualised.
- Flexibility in provision to suit adults' circumstances and schedules, (modular systems, ICT, 'flexible learning' and distance education).
- Outreach policies to reach adults who otherwise might not consider learning, or who have little motivation.
- Recognition of prior learning.

Measures to stimulate employment-related training are key for workers and the unemployed

- Practices to help workers overcome some of the barriers to training, including time and costs (e.g., flexible time management, rights to education or training leave from work).
- Ensuring access to skills assessment and the possibility of skills development in firms for groups at risk – e.g. workers who are victims of restructuring, who did not have an appropriate initial education, or older workers.
- Public employment services that operate flexible models of public training programs.
- Avoiding the sole criteria of quantitative results when financing training for the unemployed. Quality criteria must also be included in the call for tender.

Financial incentives to invest in the human capital of adults can help increase participation

- Individual incentive mechanisms such as loans, grants or individual learning accounts.
- Offering entitlements for learning or study leave during working hours.
- Subsidies to private suppliers or to individuals. Compensation for part of the opportunity costs can help to attain an appropriate level of training.
- Enterprise training levies or the setting up of national or sectoral training funds under specific conditions.

Approaches to improve the quality of adult learning can contribute to better learning outcomes

- The introduction of quality assurance systems.
- Setting standards for service delivery and publicly certifying of the achievement of these standards.
- Including evaluation as an integral part of policy design.
- Providing better support of policy choices requires research and analysis.

Adopting a coordinated approach with the different partners involved can be more efficient

- Bringing the relevant partners together can be an efficient measure. Coordinating the activities of the different actors can help to rationalise scarce resources and

contribute to more efficient public spending. Partnerships are useful tools, as is an outcomes-based approach.

- A balanced interaction between a top-down approach – in which governments define structures and financing procedures – and a bottom-up approach that enables local actors to provide feedback on the problems they face and the innovative solutions that they have found.

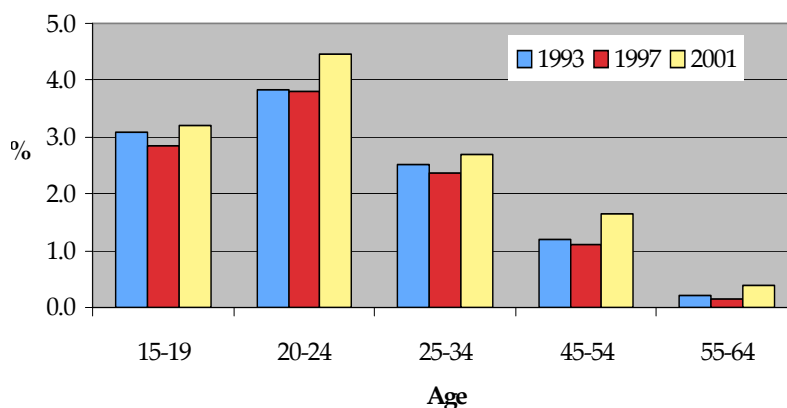
An integrated approach needs to place the individual and the enterprise at the centre

- Shaping incentives to participate; in funding mechanisms; in the design of adult learning programs; and in determining outcomes. They need to make explicit the relative responsibilities of individuals, enterprises and governments within an overall framework. As in initial education, they need to balance goals of economic development with equity goals and social and personal development. They need to recognise the reality that many adults have at best completed lower secondary education; that they often have low levels of basic skills; and that many have been way from formal learning for some years.

Participation

Older people are less likely to engage in education and training than are other age groups, but there is a slight shift toward participation by older Australians since 1993.

Figure 3 : Educational participation by workers, Australia, 1993, 1997 & 2001 [%]



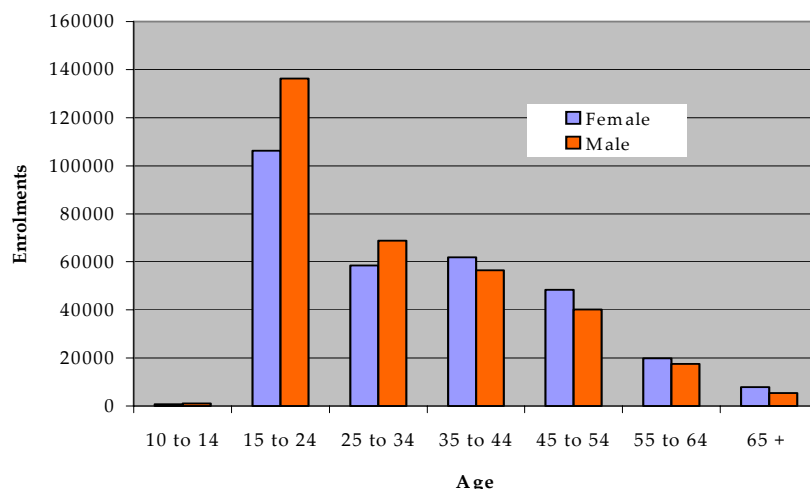
Source: Australian Bureau of Statistics: Survey of education and training

Older learners are most prominent in public VET. They represent 20.5% of all public VET students, 12.5% of apprentices and trainees and 7.2% of all higher education students. However, older learners are a small proportion of the older age cohort. In 2002, 6.9% of all Australian people (8.4% of Victorians) aged 45-56 years participated in the public VET system. Victorians aged 65 and over (1.7%) were slightly more likely to participate than were Australians of that age group (1.2%). Less than 1% undertook higher education⁷.

Participation in VET in Victoria occurs across all age groups, but mainly in the younger entry-level cohort. Participation declines with age, for both males and females, but is more evident for males older than 34 years.

⁷ Anlezark, A. (2002) *Older learners, 2002: Australian vocational education and training statistics*, Adelaide: NCVER.

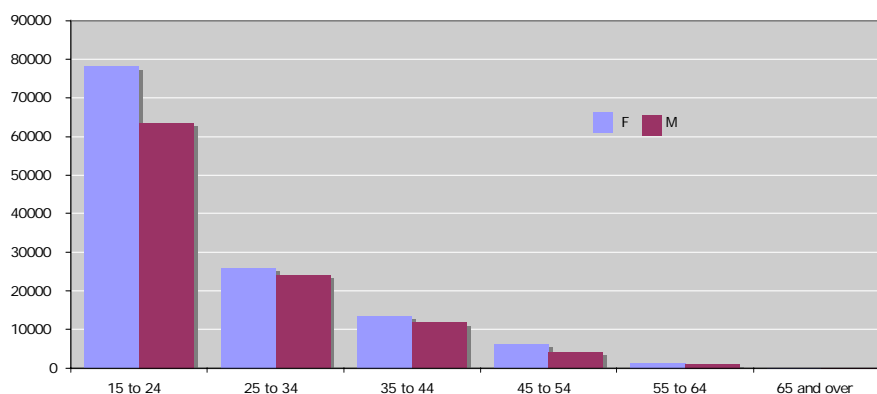
Figure 4: VET course enrolments by age and gender, Victoria 2004



Source: OTTE student collection

Fewer older learners enrol in higher education relative to VET enrolments. The pattern of decline in enrolments by age is much more pronounced in higher education than in VET. Enrolments by those aged 55 and over in higher education are negligible.

Figure 5: Higher education enrolments by age and gender, Victoria 2004.



Source: OTTE student collection

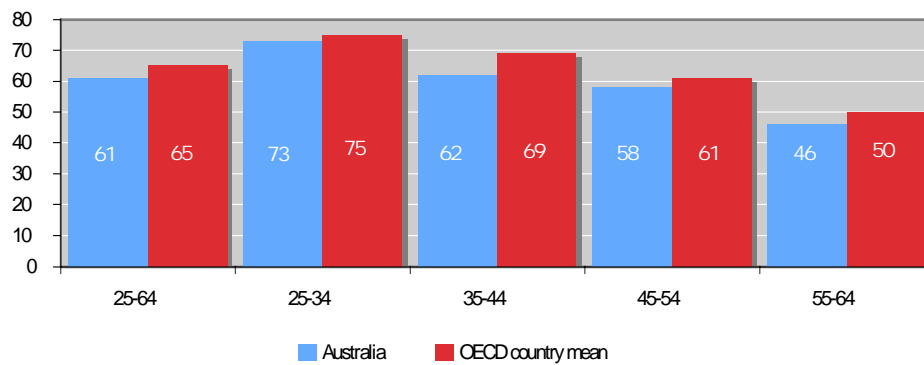
Attainment

OECD data provides a basis for evaluating the relative attainment levels of adult Australians⁸, which can be broadly applied to Victoria although Victoria generally has had higher education participation than other States .

The attainment of upper secondary education (Year 12 or equivalent) is related to later success in work and study. The attainment of Australian adults was at a slightly lower level than for the mean of OECD countries in 2002.

⁸ Comparative data is not available for Victoria.

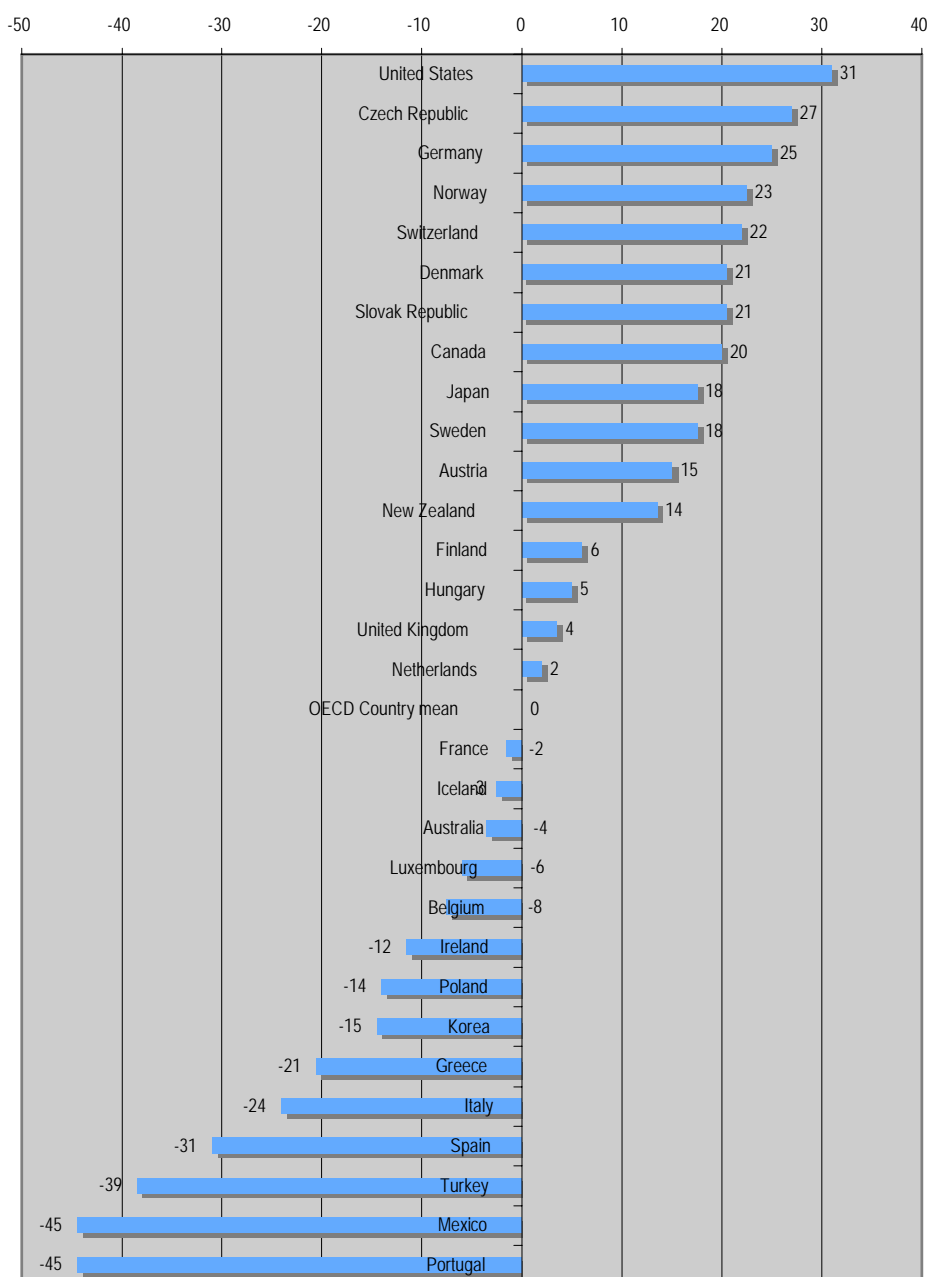
Figure 6: Attainment by population of upper secondary education by age, Australia Vs OECD country mean, 2002 (%)Source: OECD (2004) Education at a glance. OECD indicators. Paris: OECD



The attainment of older Australians is further demonstrated by comparison with other OECD countries.

The proportion of older Australians who have at least attained upper secondary education is four percentage points below that of the OECD country average. Australia ranks 19th out of 30 OECD countries on this measure.

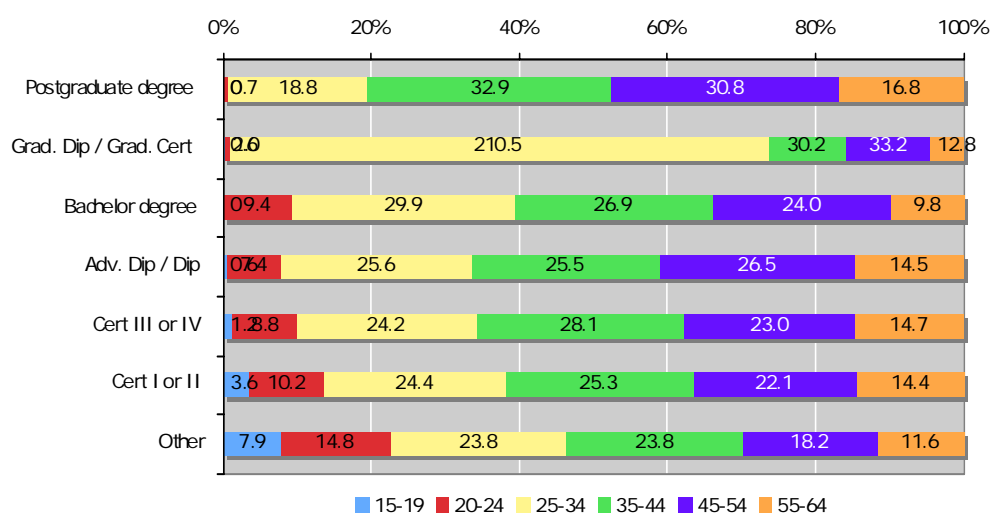
Figure 7: Variation from the OECD country mean in the proportion of older adults (aged 45 to 64 years) who have at least attained upper secondary education, 2004



Source: OECD (2004) Education at a glance, 2004. OECD indicators. Paris: OECD

Nevertheless, many older Australians have a non-school qualification, often at a high qualification level. In 2001, nearly half of the postgraduate degrees completed were completed by Australians aged 45 and over.

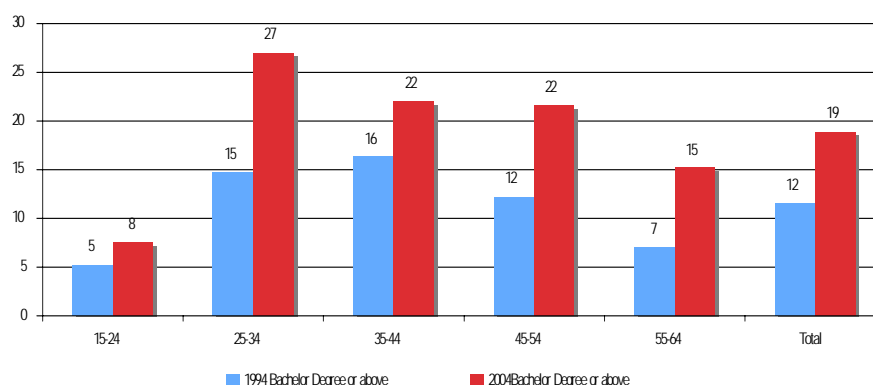
Figure 8: Non-school qualifications completed by level of education and age, Australia 2001 (%)



Source: ABS (2001) Education and training experiences. Cat 6278.0

The proportion of older Australians holding a non-school higher education qualification has increased in the decade since 1994, up by 10 percentage points for those aged from 45-54 and 8 percentage points for those aged 55 to 64. The growth in proportion of these two groups is only exceeded by those aged 25-34.

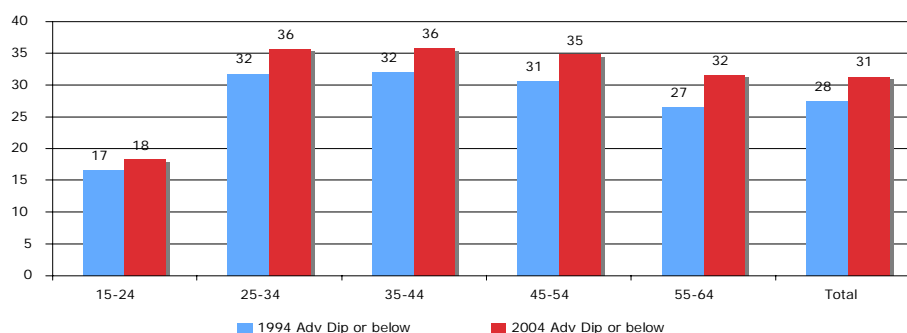
Figure 9: Persons holding a non-school qualification by age – Bachelor Degree and above, Victoria, 1994-2004 (%).



Source: ABS Education and Work, Australia. Cat no. 6227.0

The proportion of older Australians who hold awards at Advanced Diploma level and below is greater than that for higher education qualifications. The proportion of older Australians holding these awards also grew in the decade from 1994. This was at a slightly lower rate of growth than for higher education awards, but from a higher base.

Figure 10: Persons holding a non-school qualification by age – Advanced Diploma and below, Victoria, 1994-2004 (%).



Source: ABS Education and Work, Australia. Cat no. 6227.0

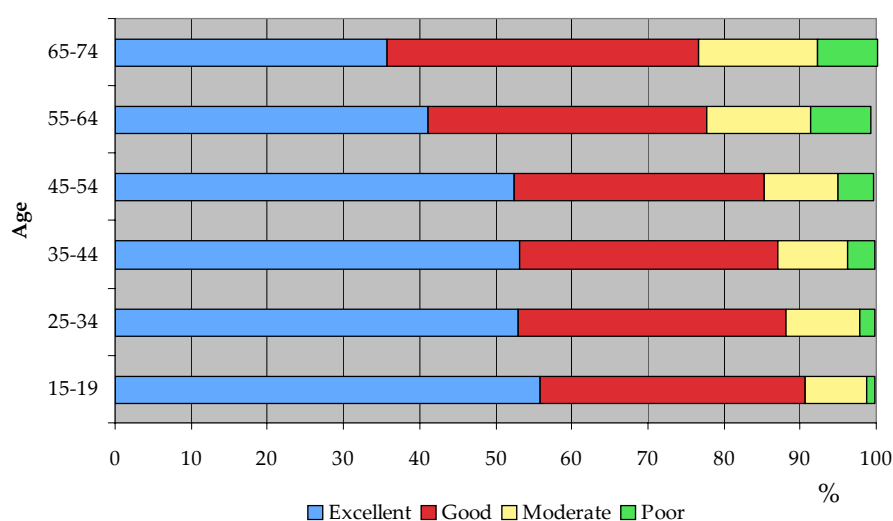
It should be noted that the trajectory for those aged 35 to 44 will place them in the older age group in ten years time. This cohort has also increased its qualification base at both higher education and technical levels in the decade from 1994.

Literacy levels

Many older learners participate in education and training to gain basic or foundation skills including literacy and numeracy. As the term suggests, basic or foundation skills are seen to be a fundamental requirement for success in life and work. The ABS, Aspects of literacy⁹ is a source of information on perceived achievement in basic literacy and numeracy tasks by Australians. This data is nearly 10 years old and may no longer provide an accurate representation of the situation. However it is included in the absence of more up to date information because we don't want to lose sight of the issue.

On the whole, older learners are more conservative in their self-ratings of their literacy skills than are younger learners. Older adults were more confident of their reading skills for daily life than of their writing or basic mathematical skills.

Figure 11: Self rating of literacy skills for needs of daily life, by age, Australia 1996 [%]

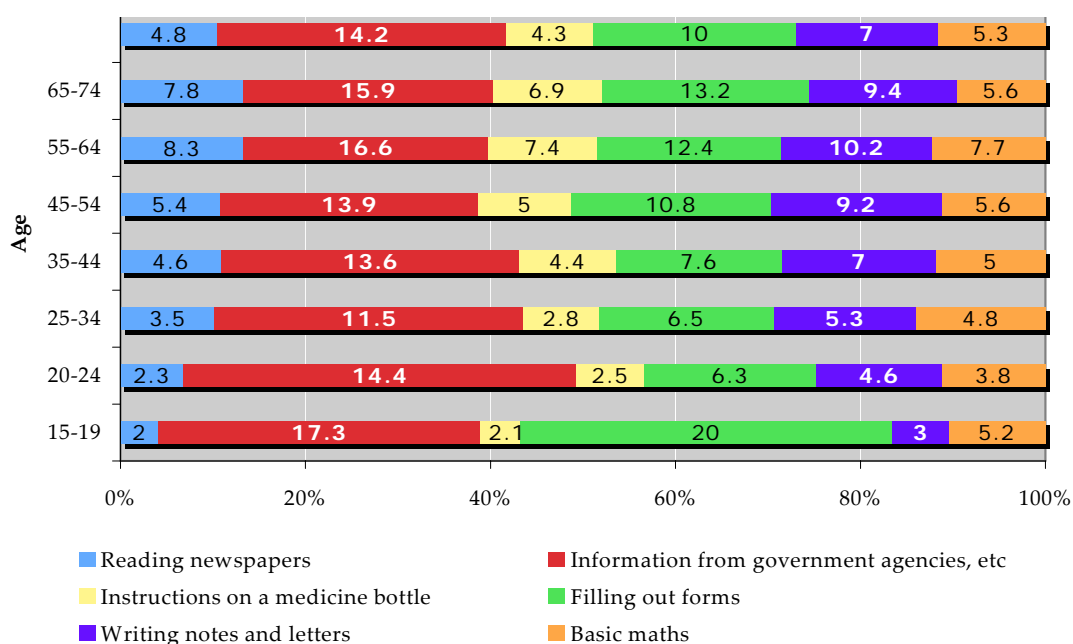


Source: ABS (1997) Aspects of literacy: Profiles and perceptions, Australia, 1996. Canberra: ABS.

⁹ ABS (1997) Aspects of literacy: Profiles and perceptions, Australia, 1996. Canberra

Older adults reported that accessing information from government agencies, filling out forms and writing notes and letters are the areas in which they required assistance. The reported need for assistance in these areas grew through the prime working age years to the age of 54.

Figure 12: Proportion of Australians who report that they need help with selected tasks, by age 1996 [%]



Source: ABS (1997) *Aspects of literacy: Profiles and perceptions*, Australia, 1996..

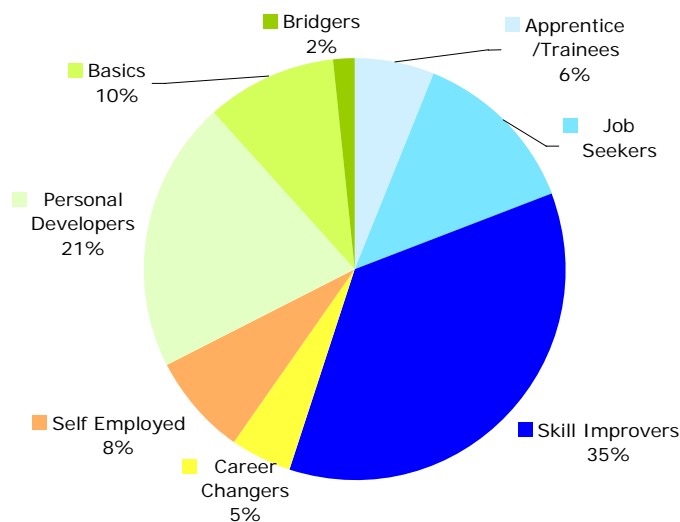
Reasons for adult learning

There is little data available on the reasons why adults participate in education and training. Recent work of the Office Training and Tertiary Education (OTTE) provides information on students' reasons for study. OTTE is developing a view of student segments in VET based on students' stated reasons for study on enrolment.

This information suggests that older learners enter into VET programs in order to develop their skills and knowledge for their current work situation (Skill Improvers, 35%), for personal development (Personal Developers, 21%) and to assist them to get a job (Job Seekers, 13%).

This distribution of students by reason for study applies to those in VET (including ACE). Those in higher education and non-accredited programs we assume are likely to have similar reasons for studying, but probably with a different distribution across the segments.

Figure 13: Mature age student segments in VET, Victoria 2004



Source: OTTE student collection

One characteristic of the older learner in VET is that they tend to engage in shorter duration programs of study than do younger students and with study loads that are not likely to lead to completed qualifications. Many older learners are seeking short grabs of skill upgrades. This is particularly the case for Personal Developers, Skill Improvers and those seeking in foundation skills (Basics segment).

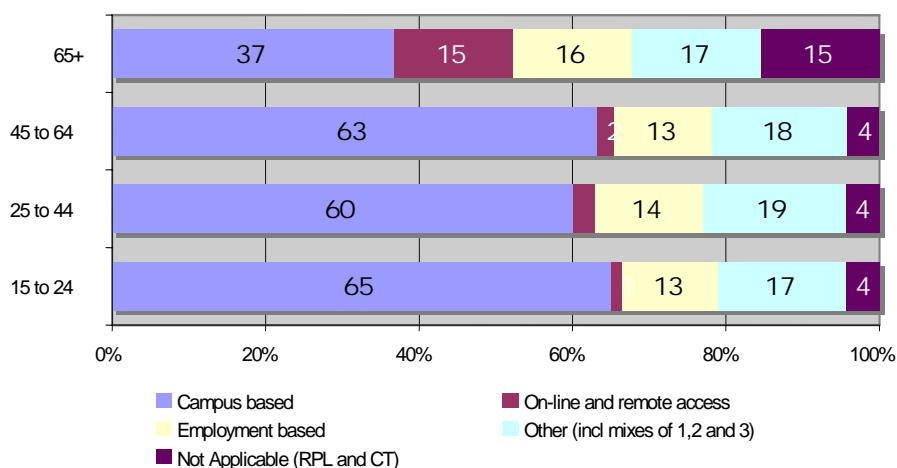
Mode of provision

Campus based delivery is the main mode of delivery for all age groups. However, learners aged over 65 years appear to access VET through a broader array of delivery modes, including online delivery.

Employment based delivery is a significant delivery mode for all ages, including those aged 65 and over. Although this represents a relatively small number of enrolments (3400).

Figure 14: Share of VET enrolments by age and delivery type, Victoria 2004 (%)

Source: OTTE student collection

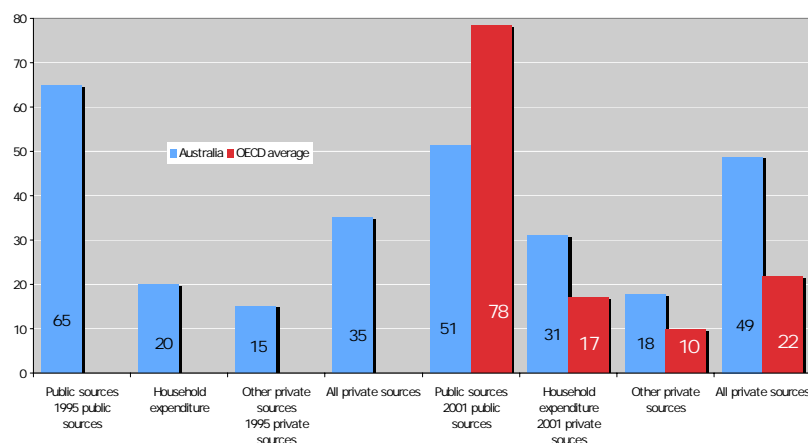


Public vs private expenditure

Private resources are increasingly important in education and training in Australia. The period from 1995 to 2001 showed growth in the share of funding from private sources. The relative contribution of funding from private sources is significantly greater than that for OECD countries and obversely, significantly smaller from public funds.

Figure 15: Public and private expenditure on tertiary education, 1995 and 2001

Source: OECD (2004) Education at a glance: OECD indicators 2004. Paris: OECD



Reasons for not participating

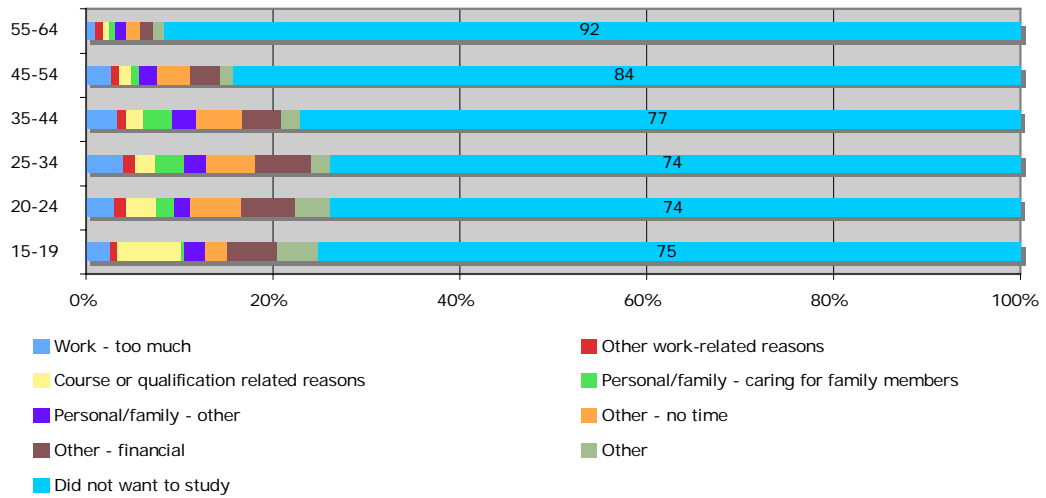
Persons not at school, barriers to study by age

While adult participation in education and training is increasing, the numbers of older adults in education and training is relatively small as shown in the data above.

The reasons for not studying (Figure 16) or training (Figure 17) are similar across each of the age groups. Overwhelmingly people at all ages do not have the motivation¹⁰ to study or enter into training. Motivation to study decreases with age.

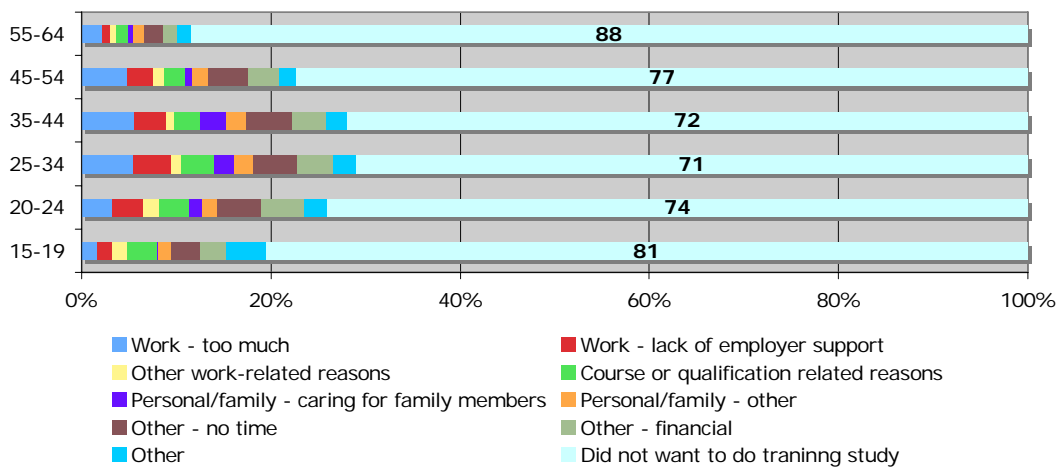
¹⁰ In general terms, the sources of motivation are as either extrinsic (outside) or intrinsic (internal). The motivating factors that engender behaviour in the first instance are likely different from the factors that provide for its persistence over time. In the context of adult learning 'motivation' is often invoked as an important factor, but needs to be unpacked lest it become yet another device to avoid looking at policy and practice and 'blaming the victim'.

Figure 16: Barriers to studying for persons not at school by age, Australia 2001



Source: ABS (2001) Education and training experiences. Cat 6278.0

Figure 17: Barriers to training by age, Australia 2004 (%)



Source: ABS (2001) Education and training experiences. Cat 6278.0

Teaching and learning for adults

Background and context

The concept of lifelong learning as the basis of policy for adult education and training dates back to the early 1970s. Influenced by the Delors Report to UNESCO Learning to be: The world of education today and tomorrow, Kangan used the concept of lifelong learning as a central construct in his 1974 seminal report of the Australian Committee on Technical and Further Education¹¹. Lifelong learning at this time was a response to the need for education and training to extend beyond secondary schooling and initial qualifications for entry to work. It provided second-chance learning for those adults who had negative experiences of learning in school years and required further education and training.

The notion of lifelong learning has currency in the hearts and minds of the vocational education and training community although it has evolved since the 1970s. Throughout the 1990s lifelong learning was directed to largely economic purposes to encourage participation in training to build skills for the economy, particularly in the context of an industry-led (or driven) VET system. The personal and social purposes for learning received little attention in VET policy.

Views of lifelong learning are changing following the impact of globalisation, dynamic technological change, the changed nature of work and working together with demographic change. These drivers of change require that individuals need to continually upgrade their skills. They must ensure that they are able to meet the frequent changes in the type of skills required in work and the rising threshold of these skills. Individuals must ensure that they address the need for greater flexibility in work and new forms of knowledge. Continuous learning becomes the norm¹².

Framing of lifelong learning changes accordingly to shift beyond compensatory education to “encompass all learning endeavours over the lifespan”¹³. In this view traditional linear models of participation have been displaced by the recognition that learning is a requirement for successful participation in working and civic life throughout the lifespan. Demographic change strengthens the requirement for the notion of lifelong learning to be extended to older members of the population,

in a time characterised by increased pace of job and skills change coupled with an ageing workforce, the notion of employment stability and linear career progression are no longer as valid as they once were [sic]. In place, what is required are opportunities for job retraining for second career and post-career employment ... and for using older, more experienced, workers as mentors and coaches for younger employees ... In providing such opportunities a key issue is ensuring that older workers have equal access to training¹⁴

Education and training is also seen as a key policy vehicle to build a high skill, adaptable workforce. Contemporary policies to address demographic change have been directed to

¹¹ Foster, S. (1999) *Centralization-Decentralization: Curriculum and Assessment in VET (Victoria)*. Unpublished doctoral thesis, Monash University.

¹² Ibid

¹³ OECD (2004) *Lifelong learning – policy brief*. p. 1, www.oecd.org/dataoecd/17/11/29478789.pdf

¹⁴ Chappell, et al (2004) p. 65

re-engage or retain older workers to meet emerging and anticipated skill shortages. A focus on increased participation of older learners is required to ensure that these learners are assisted to develop requisite skills for workforce participation. However, participation is generally associated with those who already have qualifications. That is, there is a direct relationship between educational attainment and continued participation.

This requires a view of lifelong learning that extends beyond compensatory education to meet economic purposes. This is too narrow for contemporary needs of older learners who are likely to be engaged with work on a part time basis while pursuing their lifestyle goals in partial retirement. Partial retirement is likely to extend for longer than in the past. Pursuit of social and personal purposes for education and training will become increasingly important for the older learner. Education and training for older learners should address the individual as both a social and an economic unit. This requires an expansive view of lifelong learning, in line with the view of Chapman et al who posit the:

- ... triadic nature of lifelong learning*
- *for economic progress and development;*
 - *for personal development and fulfilment; and*
 - *for social inclusiveness and democratic understanding and activity*¹⁵

So goes the rhetoric. Do policies and practice live up to these aspirations?

Participation by older learners is problematic. Research shows that beyond doubt the learners that most need to be attracted into the education and training system are those that are the least likely to participate in formal skill development. A strong policy commitment to lifelong learning together with approaches to recognising informal learning and to build on this learning would be required to encourage older learners' participation. As Kearns has noted:

*.....lifelong learning involves all forms of learning and occurs in many contexts in society. It therefore spans formal, non-formal and informal modes of learning with the home and workplace increasingly important as contexts for learning*¹⁶

Recognition of prior learning (RPL) is identified as having a significant role to play in attracting and maintaining learners into education and training. The formal process of RPL involves:

*Comparing the informal or non-formal learning the individual has achieved against the learning outcomes or performance criteria of the course or qualification for which the student is using as a basis for seeking entry or the award of credit, and determining appropriate evidence to support the claim of prior learning*¹⁷.

¹⁵ Chapman, J. D. and Aspin, D. N. (1997) *The school, the community and lifelong learning*. London: Cassell. P. 27.

¹⁶ Kearns, P. (2005) *Achieving Australia as an inclusive learning society: A report on future directions for lifelong learning in Australia*. Canberra: Adult Learning Australia., p. i.

¹⁷ Learning Australia (2005) *Draft report on national and international developments in recognition of informal learning*. Paper presented to the 28th meeting of the Board of the Victorian Qualifications Authority.

However, there has been limited take-up of RPL and dissatisfaction with its application, particularly for older learners. There was a marked decline in the number of VET graduates who had received RPL after age 44¹⁸.

A range of explanations for the low uptake of RPL are suggested in the literature including:

- *a lack of awareness of RPL*
- *a perception amongst providers that RPL outcomes do not have the same value as education and training outcomes*
- *the complex, costly and bureaucratic nature of RPL processes*
- *the existence of funding arrangements which provide disincentives for candidates and institutions to engage in RPL processes*
- *a lack of assistance and information for candidates on RPL processes*
- *inadequate professional development for RPL assessors*
- *a preference by recognised equity groups to participate in training rather than seek RPL*¹⁹.

The processes of RPL are particularly difficult for older learners who often lack self-esteem and, following processes of retrenchment, have difficulty affirming their abilities. Cameron (2005) suggests that a different process is required for the older learner group. A process that reframes RPL “in terms of recognition: self recognition, informal recognition, formal recognition”²⁰.

Other mature age learners have found that opting for direct assessment of their skills is preferable to undertaking the burdensome processes of RPL:

*The quickest and easiest way around it was to do the actual assessment for that unit. You didn't have to worry about going through all the chapters and doing the theory and just had to do the practice.*²¹

The Victorian Qualifications Authority (VQA) is trialing an alternative approach to recognising informal learning through ‘learning gain units’. This approach simplifies recognition processes and builds recognition against units of competency that describes the complexity and volume of learning acquired through informal learning. This work is still in development but provides a promising approach to RPL.

Recognition is one of the issues facing older learners. In itself recognition adds little value to the learner. It is an ex post facto approach to considering learning that has accrued from a range of life and work experiences. The issue of assisting learners’ knowledge and skill development is particularly pertinent to this project. That is, consideration of issues around learning and teaching.

¹⁸ Chappell, C., Hawke, G., Rhodes, C. and Solomon, N. (2004) *Major research program for older workers: Stage 1 – the conceptual framework*. OVAL Research Centre, University of Technology Sydney.

¹⁹ Op. cit. Learning Australia (2005)

²⁰ Cameron, R. (2005) *The mature age in transition: Innovative practice for re-engagement*. Paper presented to the AVETRA research conference.

²¹ Older learner in a Business Studies program quoted in the course of a focus group

Learning and teaching

Contemporary views of learning and learners are far from the 'empty vessel' and 'received wisdom' viewpoints of earlier times. Constructivist theories on learning hold credibility within the education and training community from early childhood to old age, yet there are different schools of thought about which views of constructivism hold greater merit than do other viewpoints.

Debates surrounding differing views of learning centre on the relative emphasis on the centrality of the individual as a learner and individual autonomy or the importance of the social context on the nature of what is learnt.

The former view draws on the school of thinking that derives from Piaget's cognitive constructivism in which the individual is seen to be "actively making sense of experience through constructing and reconstructing their theories in the light of new information"²².

A second orientation to constructivism, the socio-cultural view, draws on the theories of Vygotsky. This views learning as constructed through lived engagement in the socio-cultural world of community of practice. Social constructivists see that learning involves being introduced to a symbolic world, to the meaning system – beliefs, values, meaning structures – of a culture²³.

Down highlights the synergy, rather than competition, between the two perspectives,

we humans are not passive recipients of what we experience. Instead we are active meaning makers ...The outcomes of learning will be shaped by the social circumstances within which the learning occurs but will also be mediated by the learner's unique set of cognitive experiences. It is this interplay between individual agency and social contribution which provides the reciprocity between the learner and his/her social world²⁴.

Neither of these perspectives should be seen as axiomatic. They provide a framework within which to consider appropriate approaches to teaching and training.

Teaching and training

Approaches to teaching and training differ according to both their perspectives on learning and perspectives on the learner and the learners' role in the teaching and learning process, that is pedagogy defined by Watkins and Mortimore as "any conscious activity by one person designed to enhance learning in another"²⁵.

The term 'pedagogy' does not enjoy the same popularity with adult learning practitioners as it has in school education. Pedagogy connotes to those working in adult learning contexts a teacher-centred or didactic view of teaching and learning that is resisted by teachers and trainers of adult learners. These professionals are more likely to advocate for

²² Malcolm, C. (1995) Teaching and learning: An open or closed book? *Education Quarterly Australia*, (2), 34-36.

²³ Cobb, P. (1994) Constructivist and sociocultural perspectives on mathematical development. *Educational Researcher*, 23 (7), 13-20.

²⁴ Down, C. (2004) Learning in a knowledge economy: What strategies are required? Paper prepared for the 2004 AVETRA Conference.

²⁵ Watkins, C. and Mortimore, P. (1999) Pedagogy: What do we know? In P. Mortimore (ed) *Understanding pedagogy and its impact on learning*. London: Sage Publishing.

teaching and learning to be viewed through the theoretical lens of 'andragogy', which was coined by Knowles to describe the "art and science of helping adults to learn"²⁶.

That is, a learner-centred approach that views adult learning as being concerned to ensure that learners choose their learning goals, how and when they want to learn. Adult learners are seen to be self-directed, autonomous and responsible for their own decision-making in learning situations.

Advocates of andragogy see adult learning as different to learning by children and adolescents as a function of the greater experience of adults. Recent research suggests that this is an overly selective view of adult learning that, while it has merit in recognising the role of the learner, fails to recognise that many adult learners also require active assistance and in some cases intervention by more experienced others²⁷.

Others draw attention to the false dichotomy between adult learning and that of younger learners. That young learners are also "self motivated, self directed and self monitoring"²⁸ learners. Indeed the theoretical basis of constructivism was grounded in research into children's learning.

The issue in a learner-centred view is really around what constitutes 'good practice' in facilitating learning and how to address the particular needs of young and old learners. From an earlier synthesis of approaches to pedagogy in post compulsory education, it appears that effective teaching and learning:

- *is experientially based*
- *located in work contexts - work place or work based – and real-world experience*
- *with expert models and teams or 'communities of practice'*
- *includes learners who are self-motivated, self-directed and take responsibility for their learning*
- *develops workplace competence – skills (technical and general) and for some personal attributes (a contested position)*
- *which are demonstrated through performance to industry standards, and*
- *assessment is based on explicit evidence of performance and informs improved learning*²⁹.

These attributes are relevant for adult learning in general and also, more specifically for mature age learners. Adjustments for mature age learners are concerned with safe learning environments that are less formal than in other areas of education and training, conducted in small groups, with work experience (as appropriate to individual purposes).

Recent action research conducted by the Adult Community and Further Education Board has identified a set of principles for pedagogy in adult education.³⁰ Five principles of ACE pedagogy were identified:

²⁶ Choy, S. and Delahaye, B. (2001) Andragogy in vocational education and training: Learners' perspective. Paper presented to the XXXX AVETRA Conference...

²⁷ Ibid

²⁸ Department of Education, SA (1984) *Early literacy inservice course: Unit one*. Adelaide: Department of Education.

²⁹ Foster, S. (2004) Post compulsory pedagogy: Issues and options. Paper prepared for the Office of Learning and Teaching.

³⁰ Jill Sanguinetti, Peter Waterhouse, David Maunders (2004) *The ACE Experience Pedagogies for life and employability*

- *Focus on learners and their needs*
- *Continuous learning for work and life*
- *Building learning on and within real-life contexts*
- *Sharing power – empowering people and communities*
- *Many roads to learning.*

These principles are intended to describe current practice and to provide a framework for practitioners, rather than to mandate practice. The challenge for policy is not to advocate for a particular position in teaching and learning. Instead the policy challenge is in ensuring that practitioners involved in education and training of adult learners – including mature age learners – have the capacity to choose between a range of strategies and approaches as befits the needs of learners and that the selection of these approaches is not constrained by the organisation of the content that they are to deliver.

How is curriculum organised?

This discussion is focussed on curriculum arrangements of the VET sector. This is because most adults participate in VET. It is also the sector which is most affected by public policy over the content of education and training.

The VET sector is an industry-led system in which policy has shifted the emphasis away from teaching and learning to assessment of workplace competence and compliance with the provisions of the Australian Quality Training Framework (AQTF). Industry based competency standards, as defined within Training Packages, provide the basis for teaching and learning in VET.

Competency based training (CBT) is concerned with outcomes rather than processes. Teaching and learning considerations are the province of the profession. However, the recently developed TAA04 Training and Assessment Training Package (which replaces the training package for BSZ98 Assessment and Workplace Training) includes explicit advice on the principles for effective teaching and learning that are expected in delivery of Training Packages. While much is written about the virtues and disadvantages of Training Packages, the most challenging attribute of CBT for contemporary skill needs is its fitness for purpose in a dynamic context for skill needs and development.

The key attribute of CBT is pursuit of standardised products to assure industry of the fit between the outcomes of training for industry needs. This should not be confused with assurances of the quality of training as CBT is concerned with outcomes rather than processes.

However, in a dynamic context for the development of knowledge and skill to meet industry needs, competency standards are a fit to the industry needs of the recent past and may have little to do with the current and emerging needs in many areas.

The key messages that emerge from the literature on the impact of globalisation, technological change and the changing nature of work and working is that industry requires, at a minimum, flexibility, diversity and innovative workplace practices. These attributes are contrary to the emphasis in CBT on standard practice and routine performance.

Aside from this limitation, the processes of developing industry recognised competency standards is a lengthy one. This has been shown to be problematic in fitting the system to be responsive to the needs of emerging industries in areas of innovation. Development of competency standards requires industry involvement. However, emerging industries and the enterprises that comprise them are often very small entities, which operate at the forefront of innovation in their field. By their nature they are unable to exert influence on the VET system to ensure that the training system is able to adapt to the emerging skill needs of innovation as it is translated into mainstream practice³¹.

A related challenge is that which is posed by increasing emphasis on the workplace as the site of learning with concomitant requirements for learner-workers. Knowledge work is the foundation of innovation and productivity in workplaces. This extends beyond knowledge intensive industries such as ICT, biotechnology and nanotechnology to older industries including new manufacturing in which workers need understanding of the full process of production.

The characteristics of working knowledge are that it is highly context specific, short-lived and developed by the collaborative activity in groups, rather than individuals. Knowledge work is not amenable to the highly codified competency standards of Training Packages. The focus on the workplace and knowledge that is not readily codified poses particular problems for the formal education and training system.

What must also be kept in mind is that people do not undertake structured learning for the purpose of skills acquisition alone. This is important in the context of older learners.

Implications for policy for older peoples' learning

Age is not a barrier in itself to learning. There does not appear to be a significant need for particular age related teaching and learning programs. However, participation of older people in the education and training system needs to be supported.

Older workers have not attracted assistance with training at the same level as younger workers in the past and there are no indications that this will change if policies to retain older workers in the workforce are successful. In the future labour market, older workers will be in even greater competition with younger colleagues for employer sponsorship for skills development. Older workers access to education and training will be increasingly dependent on their capacity to exercise their individual agency in accessing resources under current settings and trends.

Generational competition for training resources is not the only issue for older learners and workers. The publicly funded training system is geared to meeting the needs of industry. The planning process does take account of individuals and community needs and will need to increase this focus to support older learners who, due to increased longevity, find themselves in retirement or semi-retirement for longer periods. This will strengthen the need for policies for lifelong learning to extend beyond economic purposes to include social and personal purposes for education and training for the older learner.

The discussion above signals a range of challenges for education and training policy in general and, more specifically, mature age learners.

³¹ Whittingham, K. (2003) *Going boldly into the future: Skills and Australia's high technology start-up firms*. Adelaide: NCVER.

Challenges

In many respects Victoria fares reasonably well in comparison to the OECD principles. Moreover, there are policies, programs and community initiatives by and for older learners, which compare more than favourably with the rest of the OECD or anywhere else for that matter. These include ACE programs, the U3A and local initiatives such as 'Men's Sheds'³². The Department through ACFEB and OTTE generally are encouraging provision for older people in ACE providers and TAFE institutes through performance agreements and program priorities, indicating that older persons learning needs are being more recognised. The Department's initiative in establishing the TAFE Development Centre to promote the professional standing of the TAFE workforce is also important for the further development of effective teaching and learning for all groups in the community.

Further research

Research need has been categorised into the following areas:

Learning for the 45 and over population

- The how, why and where of it, especially in relation to the diversity of 'clienteles' (ie the 'who' of it).
- This includes workforce development within enterprises, recruitment, retraining, succession planning, job design, and articulation between employment service delivery and active labour market policies including VET.
- Vocational education and training included in the above but also to:
 - assess responses of public and private organisations to the learning needs of and ageing workforce including unintended consequences of policies to extend work life
 - the reasons why older workers receive less training, with greater attention than hitherto, to the role of employer practices and attitudes.

Lifelong learning

- Skills and knowledge required for the 21st century.
- Learning to learn skills commencing in foundational education.
- School retention.
- Significant life transitions.

Support for policy choices

- Information and data collection on participation and spending including where and by whom.
- Research into and sharing of best practices at local, national and international levels.

³² Barry Golding presenting the growing and interesting research findings of he and his colleagues on men's learning especially in small towns, to the 2005 VET Research Day Conference VISTA – AVETRA, Victorian VET Research & Planning Network October 2005 refers to Men's Sheds a 'recent, grass roots initiative for men with no obvious overseas parallels' the subject of a forthcoming NCVET publication.

References/Further Reading

This heading is a hyperlink to comprehensive resources comprising policy documents, and local and international reports related to this project.

Acronyms

ABS	Australian Bureau of Statistics
ACE	Adult and Community Education
ACFEB	Adult Community and Further Education Board
ACFED	Adult Community and Further Education Division
AQTF	Australian Quality Training Framework
ATEC	Access Training and Employment Centre
CBT	Competency Based Training
DET	Department of Education and Training
DEWR	Department of Employment and Workplace Relations (Commonwealth)
DVC	Department of Victorian Communities
GDP	Gross Domestic product
MIPS	Managed Individual Pathways program
NCVER	National Centre for Vocational Education Research
OECD	Organisation for Economic Cooperation and Development
OLT	Office of Learning and Teaching
OTTE	Office of Training and Tertiary Education
QA	Quality assurance
RPL	Recognition of Prior Learning
TAFE	Training and Further Education – usually a reference to TAFE Institutes
U3A	University of the Third Age
UNESCO	United Nations Educational, Scientific and Cultural Organisation
VET	Vocational education and training
VLESC	Victorian Learning and Employment Skills Commission
VQA	Victorian Qualifications Authority

Table of Figures

	<i>Page</i>
<i>Figure 1: Population change by age group Victoria 2001 & 2031</i>	3
<i>Figure 2: Age groups as a percentage of the Victorian population, 2001–2031</i>	3
<i>Figure 3: Educational participation by workers, Australia, 1993, 1997 & 2001 [%]</i>	9
<i>Figure 4: VET course enrolments by age and gender, Victoria 2004</i>	10
<i>Figure 5: Higher education enrolments by age and gender, Victoria 2004</i>	10
<i>Figure 6: Attainment by population of upper secondary education by age, Australia Vs OECD country mean, 2002 (%)</i>	11
<i>Figure 7: Variation from the OECD country mean in the proportion of older adults (aged 45 to 64 years) who have at least attained upper secondary education, 2004</i>	12
<i>Figure 8: Non-school qualifications completed by level of education and age, Australia 2001 (%)</i>	13
<i>Figure 9: Persons holding a non-school qualification by age – Bachelor Degree and above, Victoria, 1994-2004 (%).</i>	13
<i>Figure 10: Persons holding a non-school qualification by age – Advanced Diploma and below, Victoria, 1994-2004 (%).</i>	14
<i>Figure 11: Self rating of literacy skills for needs of daily life, by age, Australia 1996 [%]</i>	14
<i>Figure 12: Proportion of Australians who report that they need help with selected tasks, by age 1996 [%]</i>	15
<i>Figure 13: Mature age student segments in VET, Victoria 2004</i>	16
<i>Figure 14: Share of VET enrolments by age and delivery type, Victoria 2004 (%)</i>	16
<i>Figure 15: Public and private expenditure on educational institutions, for tertiary education, 1995 and 2001</i>	17
<i>Figure 16: Barriers to studying for persons not at school by age, Australia 2001</i>	18
<i>Figure 17: Barriers to training by age, Australia 2004 (%)</i>	18