

Learning in the Third Age in the UK: motivators and barriers

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(To all the members of Sandwell U3A)

Abstract

This paper focuses on an in-depth case study in one of the University of the Third Age (U3A) organizations in the UK. The ageing society is a universal phenomenon in the 21st century, thus promoting a learning society is becoming a major project for many countries around the world. Lifelong learning plays a prominent role not only in finding employment and work training, but also in older people's learning. The U3As aim to help people over 50 learn successfully in their later life. The Third Age is a concept (comparing to the First Age, when people learn knowledge and develop skills before early 20s for their future independent life and the Second Age, when people take more responsibilities for their work, families and society at 20s to 40s) referring to people over 50 having less responsibilities for supporting their families and having more free time after their retirement. The first University of the Third Age started in France in 1968, where the Second Age (university tutors) teach the third age learners, but the British model of U3A is very different, which emphasizes older people self-help and self-managed learning and learning for fun. This paper employs the research methods of observations and interviews to examine three aspects of older people's learning in the U3A: motivations and barriers, learning method and strategies for increasing members in the U3A. Suggestions concerning older people's learning are also mentioned in this paper.

Chapter 1 Introduction

With the rapid development of technology in the 21st century, human beings have been enabled to improve in many aspects of their lives. Longevity is one of the aspects that benefits from the development of technology, living environment and social civilization. The Guardian newspaper (2009) reports that the number of people in the world over 65 was 506 million in 2008, but the report predicted that over the next 30 years, the total number would double, from 506 million to 1.3 billion, “a leap from 7% of the world’s population to 14%.” The rapidly increasing number of elderly people in the world not only changes the structure of society, but is a serious issue for every country throughout the world as well. In order to provide elderly people with healthier, more comfortable later life, education is being reevaluated by policy makers and educators in many countries. Education is a broad concept, it is not confined to one stage of one’s life, but continues throughout one’s whole life. The overall degree of civilization of one country not only depends on the educational level of one group of people, but people in the whole nation are entitled to receive education throughout their lives. Adult education is the reflection of civilization, democracy and equality of a society and becomes the prominent approach to maintain social stability and sustainable development. The University of the Third Age is an important organization in adult education, particularly in older people’s learning.

Recent years have seen an increasing number of U3A in many countries. Originally, the University of the Third Age started in France in 1968, indicating that universities were providers of lifelong education learners. Other U3As in other countries were gradually established as the years went on. Basically, there is no one fixed model for running a U3A, but indeed, there are different versions of U3A, particularly the French model and the British model. The first University of the Third Age in England was established in Cambridge and launched in July 1981. However, according to Formosa (2010: 3), the British version of U3A did not follow the French model of campus-based organization, but “sought a kind of intellectual democracy in which there would be no distinction between the teachers and those being taught, and consequently, a self-help rather than a government-supported model was adopted.” Self-help groups are voluntary, small group structures for mutual aid and the accomplishment for a specific purpose. (Formosa 2010: 3)

By the year of 2009, the U3As in the UK had developed into 731 organizations with a total of 228,873 members (The Third Age Trust, 2009). With the improvement of British U3As throughout the years and much excellent work being conducted, the British U3A formed its own distinctive features. On the website of British U3A, it defines them as follows: “U3As are self-help, self-managed lifelong learning co-operatives for older people no longer in full time work, providing opportunities for their members to share learning experiences in a wide range of interest groups

and to pursue learning not for qualifications, but for fun.” Also, as for the importance of the U3A, Beckett (2009: 56) points out that for daytime adult education, U3A plays a dominant role in many areas of the UK. U3A is the evidence that “education means a great deal more than just training people for work” (Beckett 2009: 45).

Although U3A is becoming more and more important in older people’s learning in the UK, the situation is not that optimistic. In the year 2007, the U3A contributed a paper to National Institute of Adult Continuing Education (NIACE)’s commission concerning the future of lifelong learning in the UK stating that the government should not “neglect the needs of third and also fourth agers” and went on to express concern that “lifelong learning has become a euphemism for ‘working lifetime learning’ and we find that adult education for third agers is seen as no more than a marginal activity” (Beckett 2009: 56). More than one decade ago, Elmore (1999: 10) already claims that when people are ageing, they are at the risk of being marginalized in economic, social, political and cultural aspects.

The progress of a society depends on how inclusive it is. Older people have been contributing to the society in terms of culture and economy throughout the years. People’s attention needs to be raised to reassess senior citizens’ value and governments need to provide more learning access to older learners. As Eyre (2007: 6) states, “we want to create the right climate, in which people can see opportunities available to them, not just in youth and middle age but in older age as well.” Most older people are determined and still feel motivated to learn although they are facing many physical, mental and economic barriers. It is urgent for government and relevant educational institutes to work out a series of age-oriented provision to support Third Age learners. Jones (2000: 340) contends that there is a principle that needs to be followed in older people’s learning, which is “older adults should have equal rights and access to education, with positive measures put in place to ensure equality of provision. Therefore, education purely for the sake of enjoyment should be encouraged in later life.”

In recent years, there has been research focusing on different areas of older people’s learning interpreted from the different perspectives of the researchers, but with the rapidly increasing number of senior citizens, more research needs to be conducted to provide policy makers with updated and holistic information of older people’s learning in order to work out practical strategies to support older learners. As Grosjean et al. (2009: 217) state, “In learning communities, seniors work together to define what is important to them, and develop the networks that are crucial for resilient participation in society.” The development of older people’s learning is an important contribution to our society.

This case study is conducted with this background in mind and the researcher’s intention is not to inform people about as many aspects of older people’s learning as possible, but to focus on one specific case “Sandwell U3A” (in West Bromwich in the

UK) learners. The in-depth study of this research is based on three research questions, which are:

1. Why do older people continue learning and what are the motivators and barriers for retired people in Sandwell U3A who wish to continue their learning after retirement?
2. What types of learning methods are suitable for adult learners in Sandwell U3A?
3. How can more people at the same stage of life to be attracted to continue as lifelong learners?

Chapter 2 Literature Review

According to the British website Ageuk (last updated 2 January 2013), “there are well over 21 million people aged 50 years and over, over a third of the total UK population,” and people in the UK aged 60 and above outnumber people under 18 years of age. In 2012, the number of people in the UK turning 65 was about 800,000. In an ageing society, Adult Continuing Education is becoming more important than ever before and research about older adults’ learning is essential and constructive for building up a learning society.

In the light of the research questions, the rest of this chapter will be focusing on three aspects: learning motivations and barriers, learning methods and strategies to increase members in U3As.

Promoting access for older people’s learning

In the 1990s, there were three reports touching on lifelong learning, but all of them stressed post 16 education and work training, not learning for older people.

One was “the Kennedy Report,” which was set up by the Further Education Funding Council (FEFC) at the end of 1994 to advise it on achieving one of its key aims of promoting access to FE for people who do not participate in education and training but who could benefit from doing so. The FEFC (1997b) also addresses creating a learning nation and redistributing social learning resources to Further Education, but it only mentioned post 16 education and work training, not education for older people. Allocating public learning resources equally will benefit people at different ages, but what proportion of the learning resources will older learners receive?

The second report was the National Committee of Inquiry into Higher Education’s report *Higher Education in the Learning Society* (NCIHE 1997), known as “the Dearing Report”. It emphasizes the important role of higher education in the development of a society (1997: 7). In order to encourage lifelong learning, the report suggested two main strategies, one is “the development of distance learning through advances in communications and information technology” and the other is “access to local institutions which are in close touch with local people and local needs”(1997: 195). These strategies are good for lifelong learners but need to be reevaluated in terms of older people’s learning: older learners have difficulties in learning ICT and some have no access to the internet, so it is difficult for them to benefit from distance learning. Also, older learners have different prior learning experiences which may deter them from going to a local institution; they need an informal learning community. Daines et al. (1988: 18) point out that previous educational failure can be a barrier for some older learners to joining a learning group, so inclusive and age-oriented strategies need to be made. Corder (2002: 20)

also confirms that “anyone who had a miserable time of it at school is going to find it hard to re-enter a formal educational situation.”

The third report was the first report of the National Advisory Group for Continuing Education and Lifelong Learning, “the Fryer report”. In this report, it says that “A new strategic framework is needed in place of the partial, fragmented, uneven and incomplete arrangements which exist in the United Kingdom.”(NAGCELL 1997: 4). It goes on to explain these current uneven educational arrangements in terms of non-participation by

unskilled manual workers, part-time and temporary workers, people without qualifications, unemployed people, some groups of women-notably lone parents, and those on the lowest incomes, those living in remote or isolated locations, some ethnic and linguistic minority groups, older adults, people with learning difficulties and/or disabilities, people with literacy and/or numeracy difficulties, ex-offenders, disaffected young adults and notably young

(NAGCELL 1997: 4)

It is encouraging to see that older adults were mentioned in this report indicating their need for support.

The ageing population is increasing, which is a universal phenomenon in the 21st century, and the issue of learning for active retirement is becoming more and more important for many countries. In a briefing paper for a conference organized by National Institute of Adult Continuing Education (NIACE), it was stated that “our current services are not well prepared for [improving the quality of life of older adults], and the numbers of older people learning have been actually falling in recent years.” (NIACE, 2010: 2). In the conference, four major areas are suggested to support older people’s learning: extending working life, well being and the quality of life, learning and care, informal learning. For informal learning, it says that the “government’s policy thrust to increase informal learning launched with the Learning Revolution White Paper is particularly relevant to older people who are often keen to use their skills and knowledge in mutual and self-organised learning activity.” The NIACE conference emphasized the importance of older people’s learning and suggests that their main learning method is informal Learning.

In the area of older people’s learning, the U3A plays a prominent role. As mentioned in Chapter One, the description of U3As clearly shows that “U3As are self-help, self-managed lifelong learning co-operatives for older people no longer in full time work.” British U3As are self-help organizations which are different from the French model, where the idea of U3A originated. As Professor Laslett (1989: 228) points out “no support from the funds of local or central government should be expected or

sought.” This shows that British U3As should be run by the membership and need no support or funds from local governments and educational institutes. However, according to Huang’s (2006) research in fifteen U3As in England, there were two kind of opinions emerging: one was that “local governments should support local U3As in order to facilitate their development in the UK,” whereas the other opinion was that U3As should be “strictly independent.” In order to keep their independence and not to be controlled by the government, U3As should not obtain support from local governments (Huang 2006: 832). Also the British version of U3As tries to stay away from local universities and colleges as far as possible, because “the nature and the purpose of teaching and learning for older people is to find the meanings and insights of their lives by life review,” which differs from the French version in which “second age” (university tutors) teach third age people (Huang 2006: 831-832).

Older people’s learning plays an important role in social balance and cohesion, but the current policy in the UK on older adults’ learning still needs to be improved. As Jun and Evans (2007: 55) state:

Even though focus has been placed on older people’s learning, policy initiatives linked to the idea of a learning society have tended to focus on groups such as young people, young adults, and the unemployed needing vocational training. From the perspective of learning policies related to an ageing population, the key concept has been to reduce old age dependency from an economical point of view. Therefore, policy reports on the ageing population have put much focus on recurrent education through which a younger segment of aged people could stay in or re-enter work. No detail is given on how learning opportunities would be expanded to include learning as a way of social inclusion that would greatly benefit individuals as well as society as a whole.

(Jun and Evans 2007: 55)

From the above statement, it is evident that older people’s learning needs to be taken seriously and reevaluated at the level of government.

Also in older people’s learning, a phenomenon is evident described by Williamson (2000: 49) as a “gender issue in older people’s learning,” which means in a learning community, such as U3A, female members outnumber the male members. Beckett (2009: 47) echoes that “(in U3As) women vastly outnumbered men. Almost three quarters of the members (74%) were women, and only just over a quarter (26%) were men.” A similar result was found by Chang and Lin (2011: 574), in their research that female members have relatively high motivation. The reasons are varied: people’s marital status, their concept about retirement, etc. can make older people have different attitudes toward learning. The Local governments and relevant

educational institutes need to make practical strategies to encourage older people from different social classes and ethnic groups to participate in learning communities despite of their gender.

Motivation and barriers for older people's learning

Corder (2002:17) contends that "adults have different experiences, knowledge and styles of learning, so their motivation for attending a course can vary a great deal." The reason why older people want to continue learning has a direct relationship with their motivation, which differs from the motivation of people at a younger stage of life. For people under 50, Continuing Education probably means career based learning or credential-based learning, but for people over 50, quality of life is the main motivator to prompt them to continue learning.

Wlodkowski (2008:4) says that "motivation is important because throughout our lives we have all seen the motivated person surpass the less-motivated person in performance and outcome even though both have similar capability and the same opportunity."

Ageing is a double-edged sword, people obtain significant and valuable experiences in the process of ageing, but as Ahn and Janke (2011: 654) point out, "many physical and cognitive age-related changes occur among older adults, providing them with other challenges in their daily lives that could influence their health and wellbeing." Physical decline is one aspect, it is a barrier that prevents older people from learning, but on the other hand, it is a motivator to prompt older peoples to pursue a better later life. Kirkwood (2001: 49) says that "we are not programmed to die, but survive and there is much we can do to assist this programming." Grant and Kluge (2012: 130) interpret Kirkwood's statement as follows: ageing is a universal and unavoidable phenomenon, so physical fitness plays an important role especially in people's later years. Many older learners attend activities, such as outings, excursions, dancing and Tai Chi to keep physically active, which helps "enhance functionality and quality of life" (Grant and Kluge 2012: 130). Perrault (1983: 3) also confirms that "there is substantial evidence to support the notion that exercise may be an effective way to delay the effects of ageing." Thus, physical activity can be one motivator for older people's learning.

Morstain and Smart's (1974: 83-98) work is an extension of Houle's (1961) notion about motivation for people learning throughout their lives, in which, social relationships ("make new friends or meet members of the opposite sex"); social welfare ("learners are involved because they want to serve others or their community"); escape/stimulation ("learners who are involved as a way of alleviating boredom or escaping home or work routine") and cognitive interest ("participants are engaged for the sake of learning itself") are closely linked to older people's motivation of learning.

Similarly, Daines et al. (1988: 16) argue that adults participate in lifelong learning for four goals, of which, the following three are more related to older people's learning motivation: an aspiration of further learning or creativity ("to develop a new/existing interest, idea or skill; to create something; to satisfy curiosity; to engage in the process of learning"); a personal development goal ("to discover 'if I can/if I still can'; to enhance confidence in the subject; to enhance self-esteem; to gain the approval of others") and a social need ("to meet like-minded others; to make social contact; to gain social self-confidence").

Combining Daines et al. and Morstain and Smart's work, either cognitive interest or the aspiration for further learning or creativity is the factor that prompts older people to continue learning. Mannell and Snelgrove (2012: 144) state that "cognitive health refers to the effective functioning of memory, attention, inductive reasoning, perceptual and cognitive processing, and social cognition as well as use of language, vocabulary and speech." Older people are motivated to participate in learning communities in an attempt to keep their cognition active. Also Millington (2012: 429) says that regular cognitive training is considered a way to fight Alzheimer's Disease. So keeping physical and cognitive health is an important element for older elderly individuals to continue learning. However, in Daines et al. (1988) and Morstain and Smart's (1974) work, identically, they mentioned "social relationships" and "social need," which indicates that socializing is also an essential factor to motivate older individuals to participate in social learning in order to meet people and make friends. This is considered an effective way for older individuals to reduce loneliness and obtain emotional support from each other, also to boost self-esteem and confidence. Adams et al.'s (1997: 212) statement also confirms the above point, "social wellness refers to the perception of having support available from family or friends in times of need and the perception of being a valued support provider."

Advancing age brings older people life experiences and wisdom, but on the other hand, age itself can be a barrier to learning (Corder 2002: 25). Physical and mental abilities decline and can prevent older people from learning, but for people with a positive attitude, the decline can be a motive to encourage them to pursue a better later life. Age-related problems, such as the decline of vision and hearing, becoming forgetful, etc. is a general phenomenon for almost all ageing people, but Corder (2002: 21-25) summarizes additional barriers that can reduce the joy of learning for some older individuals: sensory impairment (if a person has difficulty in hearing or is visually impaired, it is challenging for them to attend some kinds of classes); basic skills (literacy and numeracy) and dyslexia, the last two depend more on an older learner's prior experiences that can either boost or lower their confidence to participate in a new learning environment after their retirement.

Also Daines et al. (1988: 18) state that there are a numbers of barriers that can prevent someone from becoming an adult learner. These are situational,

dispositional and institutional barriers. The first one, in the case of older people's learning, can be low income for older people or they need to stay at home taking care of their grandchildren. Jesmin et al. (2011: 548) also point out that "low income societies are ageing rapidly, government and families face challenges to support the seniors," that can be an external barrier to keep some older people outside of a learning community. The dispositional barriers for some older people can be lack of self-confidence and stereotypes of older people's learning. As Merriam and Caffarella (1999: 57) claim, "internal barriers tend to be associated with those which "reflect with personal attitudes, such as thinking one is too old to learn." The last one, institutional barriers, can be inconvenient location, inappropriate subjects or unhelpful staff.

Many older people find new challenges and limitations in their individual life when entering the stage of Third Age, it is crucial for them to adjust their life style and overcome the emotional barriers, and community learning is an effective way to do this and also increase their quality of individual life (Grosjean et al. 2009: 217).

Learning methods for older learners

Different adult educators have different interpretations about adult learning methods. Williamson (2000) points out that

In addition to formal learning activities, the total landscape of learning activities in later life encompasses nonformal, informal and self-directed learning activities sponsored by educational institutions, community agencies, voluntary organizations, and the individual learner either alone or in collaboration with supporting resources.

(Williamson 2000: 64-65)

The main adult learning methods are summarized in this statement as nonformal, informal and self-directed learning. According to Mocker and Spear (1982: 4), nonformal learning means the learners will choose the objectives, but they do not possess the right to decide on the teaching means, for example, learners may want to learn gardening, but they cannot decide in what way gardening should be taught. Informal learning means the learners can control the means, but not the objectives, for instance, learners can choose online distance learning, but the subjects available online are fixed, they cannot change them; whereas self-directed learning allows the learners to control both objectives and means, learners have the freedom to control and pace their learning process, for example, learners can choose to learn basic ICT skills at home or learn about history by visiting a museum.

However, different educators have different opinions on the concept of learning methods. Coombs (1985: 92) defines informal learning as "the spontaneous,

unstructured learning” which can happen in and outside of the home. Informal learning is the most popular method for adult learning at present. Whereas, Petty (2009:357) points out that in adult education, if the content is too much but the time is limited, “self-directed learning gives control and responsibility for learning to the learners.”

Also after proposing andragogy as a theory for adult learning, Knowles (1980: 43) describes the European concept of andragogy as “the art and science of helping adults learn.” The andragogical model is based on several assumptions: “the need to know about why learn a certain subject; the learners’ self-concept; the role of the learners’ experience; readiness to learn; orientation to learning and motivation.” These elements reveal that andragogy emphasizes the independence and self-directedness of adult learning. Adult learners are responsible for the whole process of their learning.

Similarly, Schugurensky (2000) concludes three aspects of informal learning: self-directed learning, incidental learning and socialization, also he points out that “Intentional and conscious” are the characteristics of self-directed learning, which means older learners know exactly what they want to learn and in what way in the form of self-directed learning.

Speaking of older learners, such as learners in U3A, *Handbook for Group Leaders* (The Third Age Trust 2008: 9-10) clearly states that the purpose, style and methods of learning in U3As:

“The pleasure of learning is a driving force in the work of U3As; U3As neither require nor award any qualifications; By sharing their learning U3A members help one another to develop their knowledge skills and experience; U3As arrange and support their own programmes as appropriate to their chosen learning activities; U3A members regard themselves as both learners and teachers.”

(The Third Age Trust 2008: 9-10)

Also Beckett (2009: 11) claims that in U3As, people come together “seeking and sharing knowledge,” there are no strict boundaries between group organizers and the taught. People with similar interests in a subject get together forming a group, and the group organizer or leader “might not know anything more about the subject than the others,” but they have the ability to co-ordinate, encourage and lead people to effective learning. Schugurensky (2000) also states that in informal learning, individual learners or group learners can learn in a variety of ways, such as books, media, networks and their own experiences. These are the characteristics of older people’s learning style.

The above statements show that in British U3A, the third age learners adopt informal and self-directed learning methods, and enjoy leisure and active learning.

Apart from the learning methods, learning with people at a similar stage of life in a safe, comfortable and supportive environment matters for older learners. In informal learning, help and support from peers is encouraged and cherished, according to Delahaye & Ehrich's (2008: 651) summary.

Older learners are quite different from the younger generation; they have already formed their own judgments based on their life experiences, so they favour choosing what, how and when to learn on their own, which are the evident signs of self-directed informal learning. Also, a relaxing and stress free atmosphere enables older learners to learn successfully.

Older adults are ageing, but their natural learning desire and motivation do not decline but get strengthened with the concept of active ageing in mind. Supportive policies, inclusive, organized and well-applied learning methods will help more older learners learn successfully.

Chapter 3 The research design

In this research, I used an overarching interpretive paradigm and a qualitative approach in this particular case study.

According to Bassey (1999: 44), "Interpretation is a search for deep perspectives on particular events and for theoretical insights." Basit (2010: 14) also claims that interpretive researchers pay attention to "small numbers and in-depth analysis" in the research, but not in trying to generalize. As Basit (2010: 14) goes on to explain, "this (the interpretive) paradigm interprets social reality the way it is viewed by the research participants." This research carried out in Sandwell U3A was in an attempt to grasp the point of view of the participants about the sociocultural learning environment for older adults in Sandwell, especially in the aspects of learning motivations, barriers, learning methods and the possible practical strategies to increase the number of members of Sandwell U3A. Everyone has different positionalities that led them to view and interpret the world around them differently, thus as a researcher focusing on older adults learning in Sandwell U3A, this study always considered the perspectives of the research participants. Bassey, (1999: 43) also supports my point of view stated above: "Concepts of reality can vary from one person to another."

"...the methodology of the interpretive researchers is described as 'qualitative'" (Bassey, 1999: 43), so my research about Sandwell U3A was qualitative research. Merriam (1998: 5) describes qualitative research as "an umbrella concept" which overarches different inquiries. Researchers can use a qualitative approach to understand and interpret a particular social context in a natural way, in other words, not to change it but to keep the setting as it looks like naturally. Patton (1985:1) explains that "qualitative research is an effort to understand situations in their uniqueness as part of a particular context and the interactions there." My research about older learners in Sandwell U3A is not an attempt to foresee what would happen in the future, but to understand the natural uniqueness of this field currently: what it looks like learning in Sandwell U3A for the participants, what their learning attitudes are like, what they think about older adults learning, what Sandwell U3A means for them, etc. I strived for an in-depth interpretation and would share the analysis with others who are interested in this area.

According to my research questions (see Chapter 1), from the perspective of the learners in Sandwell U3A, questions two and three were explored through the use of case study. Because Yin (2009: 9) suggests that "'how' and 'why' questions are more explanatory and likely to lead to the use of case studies."

Cohen et al (2011: 289) say that "a case study provides a unique example of real people in real situations, enabling readers to understand ideas more clearly than

simply by presenting them with abstract theories or principles.” Again, according to Cohen et al (2011: 129), some key terms about case study absolutely fit my research. Sandwell U3A had a **uniqueness and particularity** in terms of its sociocultural and socioeconomic background which might be different from other areas in the UK; **sincerity** existed both in me, the researcher, and in the participants, as I was very interested in the domain of studying older people learning and sincerely investigated and interacted with the participants of Sandwell U3A; the participants were open-minded to my research and also bore an interest in my investigation; also in my research, I sought to perceive and understand the older learners in the **specific situation** of Sandwell U3A and tried to **portray** it and **analyse it in depth**, to have an **analytical** discussion.

In my research, I employed two methods to collect data, one was interview and the other was observation.

“Interviews are the most popular method of gathering data for researchers working within an interpretive paradigm using a qualitative methodology” (Basit 2010: 99-100). Merriam (1998: 71) also says that “interviewing is a common means of collecting qualitative data.” The strong point of interviewing is as Patton (1990: 196) claims, “we interview people to find out from them those things we cannot directly observe...the purpose of interviewing is to allow us to enter into the other person’s perspective.” In the light of my research questions, I could not observe older learners’ learning needs, motivations, barriers, suggestions to increase members in Sandwell U3A, but through interviewing, I could get solid and first hand information from the participants to validate my research and help me better interpret the older learners’ situations in Sandwell U3A, to strengthen my answers to my research questions. These were the reasons I chose interviewing as one of my data collection methods.

There were nine participants in the face-to-face interviews, see Table 1. I have changed the real names of the participants to protect their confidentiality.

Pseudonym	Age Range	Length of Time Living in Sandwell
David	71-80	44 years
Patsy	71-80	44 years
Jane	61-70	48 years
John	61-70	Whole Life
Grace	71-80	Do not Live in Sandwell
Paul	80 above	81 years
Nancy	71-80	77 years
Alice	71-80	72 years
Lisa	80 above	Whole Life

Table 1: Participants in the interviews

Merriam (1998: 94) says that “observation is another primary source of data in

qualitative research.” He goes on to explain that the information obtained through observations is “first hand encounter”, which occurs in the “natural field setting.” Basit (2010: 121) states that “In educational research, observation is mainly used in the classroom to look at teaching and learning, student behaviour, teacher-pupil interaction and so forth.” According to my research questions, the most direct and effective way to answer the question about teaching methods for older learners was through observations. I was enabled to grasp an accurate portrayal of the interaction between group organisers and learners, to find out older learners’ preference of learning style. In my research, I observed one committee meeting and seven different types of classes: history, literature, Latin, holiday Spanish, music, play reading and Tai Chi. The history, the literature, the Latin, the music and the play reading classes were nonparticipant observations, because, as a researcher or an observer in this situation, I needed to keep a distance to observe and interpret the situations as impartially as possible in order to try to ensure the valid outcomes of my research. The holiday Spanish and the Tai Chi classes were participant observations. As Basit (2010: 124) points out, “an outsider can also act as a participant observer.” It was crucial for me in my research to participate in a few classes to experience in person whether the teaching methods were suitable for older learners and what impact the teaching contents and methods would have on older learners’ learning. So observation was another indispensable tool to collect the data in my research. The total number of people who participated in my observations were 76, which was more than half of the total members; there were nine interview participants, but for each of them, the length of the interview was about half one hour and even longer for a few of them, which enabled the participants to adequately express themselves on learning motivations, barriers, learning methods and advice on enlarging the organisation. So the number of participants in my research might have the potential to represent the whole situation of Sandwell U3A.

As for validity, Burton and Bartlett (2009: 25) say that “validity refers to the ‘truthfulness’, ‘correctness’, or accuracy of research data.” In my research, I strived to ensure the validity of my findings according to Cohen et al. (2007: 144-145).

Since I decided to focus my research on older learners in Sandwell U3A, from September, 2012 to January, 2013, I attended their monthly meetings twice, one committee meeting, observed 7 different classes (one class on two occasions) and interviewed 9 people face-to-face, usually in pairs, with the interviews lasting for about one hour on each occasion. Currently, there are 14 types of classes available in Sandwell U3A, the observed classes were half of them and therefore revealed convincing and sufficient data for my research questions. Eight out of nine interviewed participants are permanent residents in Sandwell and therefore they could be considered to have deep understandings on older people’s learning in the sociocultural and socioeconomic environment of Sandwell, which strengthened the validity.

Basit (2010: 67) states that “triangulation is a strategy that is used to establish concurrent validity in research by looking at the same issue from different perspectives.” In my research, I used observations and interviews to validate my findings, because, as Bogdan and Biklen (2007: 115) explain “many sources of data were better in a study than a single source because multiple sources lead to a fuller understanding of the phenomena you were studying.” The use of the observations and interviews in my research could support and strengthen each other to ensure the internal validity. For example, in the observations, I could observe some learning barriers and learning and teaching methods, but obviously I could not observe the intrinsic and extrinsic motivations of the learners, mental and economic barriers or suggestions for policymakers, which I could obtain from the interviews. The use of these two data collection methods in my research were woven together and triangulated each other. In my research, I also tried to use triangulation to reduce the “Halo effect” (Basit 2010: 65), in which my knowledge of the participants and the situations may affect my judgement.

In the process of writing, I ensured my writing was not out of context, it just reflected the true social and cultural situations in Sandwell U3A. I obtained the Chairman’s permission of Sandwell U3A to use the real name of their organization (Sandwell U3A) and the name of “The Public” (the main venue of their activity) in my dissertation to strengthen the authenticity of my research.

Ethics is also an important issue in any research. Bassey (1999: 73) categories “research ethics under three headings: respect for democracy, respect for truth and respect for persons.” Furthermore, “the Association (British Educational Research Association) considers that all educational research should be conducted within an ethic of respect for: the person, knowledge, democratic values, the quality of educational research and academic freedom” BERA (2011: 4). In my research, the considerations of ethical issue were kept in mind throughout the whole process: in the design stage, in gaining access to the participants, in data collecting and analysing stage as well as finding- writing stage (Basit , 2010: 56).

When trying to gain access to the participants of my research, I submitted the ethical approval form to my supervisor for permission and then contacted the chairman of Sandwell U3A stating my research purpose and asking if they were willing to let me conduct observations and interviews in their activity sites. I had already obtained ethical approval from my supervisor and permission to access Sandwell U3A from the chairman to conduct my research.

In data collecting stage, I first obtained the Voluntary Informed Consent of the participants. I stated what my research was and its focus. I explained this research was only for the purpose of getting information for the research questions and the information gathered would be anonymous and all the information about

participants would be kept confidential. The privacy of all participants was protected in the whole process of the research. The research would be only used in the preparation of a dissertation for the degree of MA Education and for no other purpose. I ensured the rights of the participants to withdraw from the observations or interviews for any or no reason at any time. I gave them a written statement of the above and obtained their signatures by way of consent. During the process of data collection, I showed respect to every individual participant and expressed my gratitude for their time and participation. I was aware of not hurting the participants by misused words or inappropriate behaviours.

Cohen et al. (2007: 26) argue that “there is a risk in interpretive approaches that they become hermetically sealed from the world outside the participants’ theatre of activity—they put artificial boundaries around subjects’ behaviour...so interpretive and qualitative theories can be criticized for their narrowly micro-sociological perspectives.” Burton and Bartlett (2009: 64) also claim that “a major criticism of case studies is that they lack a representativeness of the wider population...” My research was a case study focusing on the specific group of older learners in Sandwell U3A, the outcomes of my study might not represent the holistic situation for older learners in the nation, but my aim was not to generalize the findings, but to pay attention to the uniqueness and in-depth analysis and interpretations, to develop empirical knowledge, which, on the other hand, might be used as a reference in similar research in the future.

Chapter 4 Presentation, Analysis and Discussion of Data

Socioeconomic background knowledge of the Borough of Sandwell

Sandwell is a metropolitan borough, which is situated in West Midlands in the UK. The Sandwell borough has six towns, which are Oldbury, Rowley Regis, Smethwick, Tipton, Wednesbury and West Bromwich. According to Research Facts (2011), Sandwell is a diverse and multicultural borough with a population of 292,800 (July 2010), in which minority ethnic groups are 23.3% and the number is still increasing. Sandwell is a deprived area compared to West Midlands and Great Britain. The figure of the Indices of Multiple Deprivation (IMD) 2010 shows that Sandwell's average deprivation score as ranked 12th most deprived local authority in England, out of a total of 326. At May 2011, according to Job Seekers Allowance (JSA), there were 13,285 people in Sandwell applying for jobs, which occupied 7.2% of the local working population in this area, comparing to West Midlands (4.7%) and Great Britain (3.7%), 7.2% is relatively high and nearly double the national average. Also from July 2009 to July 2010, the unemployment rates in West Midlands was 9.1% and Great Britain was 7.9%, whereas Sandwell, at the same period of time, was 15.0%, which was also nearly double the national level.

The particular socioeconomic background of Sandwell has an influence on the lifelong learning of residents, especially the motivations and the learning methods, which are the crucial basis for the organizers of Sandwell U3A to make strategies to attract more older learners of diverse background in this area.

The rest of this chapter will consider the evidence from the observations and interviews in relation to each of the research questions in turn.

1. Why do older people continue learning and what are the motivators and barriers for retired people in Sandwell U3A who wish to continue their learning after retirement?

Issues raised by the observations:

In the observations, the following examples show that socialising and learning new knowledge are equally important factors to motivate older learners to continue learning.

In one of the Literature classes, the teacher and members sat together taking turns to read poems written in 1950s, 1960s and 1970s. After reading each one of the poems, they stopped to discuss the words, the structure of the poem and mainly recall something related to their personal experiences at that particular period of time. Through the discussion, they got to know each other better and learn new

knowledge from each other and the poems. This is clearly linked to the question one that socialising in a learning group and learning things from peers motivate older people to continue learning.

A similar situation happened in a comparatively bigger group of 15 members in the history class. Normally there is a lecturer talking about local history in the class, but that day when I observed, it happened that there were 3 new members joining in, so the group leader invited each of them to deliver a speech about their own experiences. So that history class was presented in a whole new style, which was divided into 3 parts of personal experiences. Every member seemed to enjoy either listening or speaking stories from a long time ago. Learning from others' personal experiences can be considered as a kind of history learning as those experiences were a microcosm of that particular period of time, and at the same time, they made more new friends. This is another evidence for the question one that motivation can come from getting to know new people and sharing things together.

In the play reading class, occasionally a new member came in to share one role to read, so members gradually got familiar with each other and learnt and discussed new knowledge conveyed from the script. Members in the music appreciation group became acquainted with music while immersing themselves in the atmosphere of sitting together and appreciating the music.

The above examples are important evidence for question one that getting out of house and getting to know more people may be one reason that motivates retired people to attend a learning community, like Sandwell U3A. Also learning something new to keep their brains active is also the key motivator for them to continue Learning.

In the observations, it could be seen that older learners accept different difficulties and try to cope with them.

A visually-impaired man attended the music class, the literature class and history class in spite of his own limitations; some have physical problems, like arthritis, so they cannot attend classes, such as outings and line dancing, but some people with physical problems do attend classes, like Tai Chi, to exercise their joints through a set of movement. It shows that these learners have great motivation to encourage themselves to join in learning groups in order to overcome their physical barriers, so sometimes difficulty can be transformed into momentum in the process of Learning.

Mental barriers may be the biggest problem for older people. It is natural that when people get older, they memorize things slower and forget them faster than they used to, and they will take a little more time to react to a certain thing, but on the other hand, they have more experiences to help them learn and master new things. When they learn language, for instance, in the Latin and holiday Spanish classes, the

members' past language-learning experiences helped them command a new language. Even though when people get older, they cannot remember things very well, their capability of understanding is strengthened throughout the years and is a solid and positive factor in adult learning.

Apart from the physical and mental challenges, some economic-related problems should be considered. For example, the Tai Chi class is in a normal meeting room. Members move all the desks and chairs to one side of the room and then do Tai Chi on the other side. I happily accepted their invitation to join them and experienced that the venue was not spacious enough for body movement, because I was always aware of not hitting my hands on the columns in the middle of the room or not hitting other members when doing the movement. In the light of the socioeconomic background of Sandwell, the economic-related barriers may exist, but learners are not prevented by the difficulties from learning.

Issues raised by the interviews:

The 'socialising' point of view I mentioned above was echoed by members during the interviews.

Patsy said, "...the other aspect of U3A is, it's socialising, because lots of retired people are very lonely...so it's nice to go and meet socially and learn something, and lots of people come along for that, we met a lot of friends since we joined U3A."

Alice and Lisa expressed that joining U3A "can make contact with people because you lose contact with people when you get older" as well as "I wanted more or less to meet all the people for opportunities to talk and meet with those people, not just about learning...and the scope in that U3A has given me other things to do, not only learning, it's about socialising, meeting new people."

But socialising is not the only reason that prompts people to join in a learning community. People who have been in education throughout their lives found no reason to give up learning even after their retirement.

Patsy expressed her passion for education, "I've always been in education all my life, I was a school teacher...so I'd like to come out and learn something new."

Besides, people who attend classes in the U3A want to be active and keep stimulated by learning new and different things.

David said, "I have a low tolerance of boredom, it is no good sitting at home and doing nothing, I like to be active, busy...U3A gives you a chance to be active."

Alice took the view that "I think it's the urge to know more, it (learning) keeps my

brain going.”

“I have the time to take on more different aspects of learning...when I retired at 58, I thought I needed something to do, something that will keep me stimulated...I suppose I don't want to get stagnant, a lot of challenges, I want to know about things all the time, it's natural curiosity,” Jane said.

These remarks indicate older people want to stay active, especially cognitive active by joining in a learning community.

Also different opinions came out during the interviews. Patsy said, “one of the classes, which is not really a class, it's the lunch club, we go and have lunch somewhere, we don't go to the same place every month, we go to all different new places, so we were learning different new places.” Whereas Grace does not feel the same way, she took the view that classes, like lunch club, isn't a kind of learning, “the Sandwell U3A is more like a club, it doesn't function properly.” She preferred “a more intellectual one.” Sandwell is a borough populated densely with working-class people. When they retired, they may want to learn things and make contact with people in a more relaxing way. One member wrote a letter to the committee of Sandwell U3A saying that it (U3A) helped her a lot, since she retired and her husband died, she stayed at home and felt lonely, but by joining in U3A, she made new friends and had been to a theatre for the first time in her life. So people with different backgrounds may have different motivations in learning, which is very important factor for the question one.

Barriers for older learners are also various. Paul said that his serious migraine hinders him from learning properly in a way, and his wife, Nancy, has problem with her hips so she cannot attend the dancing class, but they are still learning despite these physical problems. Also Paul was redundant years ago with no pension, so this couple think they cannot afford it if the enrollment fee at Sandwell U3A goes up to 20 pounds per person per year, although some other members think it “very cheap and reasonable.”

Also David and Patsy talked about other problems, “we had an IT class with the U3A, but it is always a job to get the venue, get the computers, something like that. So sometimes you just have to go outside of the U3A to learn more what you want to learn.” “We had a computer section, no support, people didn't come, so we have to close it. The internet wasn't there, people weren't coming to do the course, to do the class, so the tutor was there alone, no good, so we closed it.” This particular problem may be only related to Sandwell U3A because of its socioeconomic background, but in general, older learners need access to more learning resources indeed.

Apart from these physical and economic problems, Jane and Patsy's remarks on older people's learning barriers seem more general.

Jane said, "...obviously, as you get older your memory isn't quite there, it's not as acute as it should be, so retaining things isn't always as easy as it always has been in my working days."

"I do think that a lot of people find it difficult to concentrate when you're getting older. If you can't concentrate, you can't learn. I think a lot of people find it difficult to listen, so that they don't remember...I think that's important," Patsy said.

David also said, "if you've got a habit, you can continue it, if you haven't got a habit, very difficult to begin that later in life." In the Literature Review, Daines et al. (1988: 18) indicates that one's previous educational experience will have an impact on the learning in their later life. Because Sandwell is populated with working-class people, who may not have too many educational experiences in their early lives, it is a challenge for Sandwell U3A to help these potential learners to overcome their psychological barrier to join learning groups.

Some participants showed their positive attitude towards barriers. Because barriers, on the other hand, may be the reason that motivates older learners to take on more learning, as Lisa said, "as you get older, you do find you forget things more than you used to, forgetful, but on the other hand, I can still learn and remember new stuff as well....it keeps reminding yourself." So getting older and forgetful are not negative things, people can still enjoy the learning process.

The expressions of the participants are really important to my question one, people sometimes tend to separate motivations and barriers apart, but actually, there is no a clear boundary between them, it depends on people's attitudes, and the older learners in Sandwell U3A set a good example for us.

Discussion:

As I mentioned in the Literature Review, Daines (1988:16) summarizes adults participate in lifelong learning for a variety of reasons. They can have more than one motive. A social need is one of the motivators for members in Sandwell U3A, they come along to meet like-minded people, to make social contact, to gain social self-confidence. Morstain and Smart (1974: 83-98) also point out different perspectives on motivation by extending Houle's (1961) notion, amongst the six factors, social relationships (in order to make new friends), escape/stimulation ("learners who are involved as a way of alleviating boredom or escaping home or work routine") and cognitive interest (learners are "engaged for the sake of learning itself") were mentioned by my interviewees, and the cognitive interest may be the motivator for most members in Sandwell U3A, they are interested in learning itself, the outcomes become less important.

As mentioned in the Literature Review, Corder (2002:17) points out that "adults have

different experiences, knowledge and styles of learning, so their motivation for attending a course can vary a great deal.” Grace, who wants a more intellectual class, may require a more concrete outcome from the courses than is available in Sandwell U3A, whereas, some people regard learning as the social gathering, such as the lunch club. People think it a good opportunity to meet new friends socially. Patsy, who prefers the lunch club, may have social and intrinsic motivation in which she does something for the pleasure of doing it, while Grace, who is more intellectual, may have a mixed motivation of intrinsic and extrinsic. She may have an internal desire to learn something, but she expects an outcome most, so in this way, her motivator can be extrinsic. The analysis of people’s motivation needs to be considered by U3As or other types of adult education centres on how to design suitable courses to accommodate different members’ different needs.

In the Literature Review, Corder (2002:25) states that age makes a difference to our ability to learn. Our physical abilities decline with age, but meanwhile, Corder also points out that although age can be a barrier to learning, there are also advantages to being an older learner, as I mentioned above, more experience and stronger comprehension can give an edge to adult learners.

Daines (1988:18) also says that there are a number of barriers that can prevent someone from ever becoming an adult learner, such as “lack of money, lack of self-confidence, feeling too old, inconvenient location; inappropriate subjects and unhelpful staff.” For Sandwell U3A, committee members may take account of many aspects to reduce the barriers for older learners, such as, establishing a safer, more comfortable and relaxing environment, reasonable fees for every member, interesting and informative subjects, physically-challenged people-friendly facilities, etc. When some barriers are removed, more new members may come along.

2. What type of learning methods are suitable for adult learners in Sandwell U3A?

Issues raised by the observations:

The observation shows that informal learning is the main learning method for older learners.

In the music group, members just sat comfortably enjoying music piece after piece, occasionally they had a little discussion with the group leader; in the history class, as the group leader said, members can take in history through a lecture, but they can also learn and share something by listening to others’ personal experiences, the content they are learning is quite random; in the literature class, the literature work they were appreciating was actually a key to their memories that were awoken up by those words and scenes, then they started talking about the most popular songs and people’s dressing style, etc. in that particular time with great relish; in the Latin class, because this is a mixed-level group, when the group leader was mentoring one group,

members of other groups would study on their own, some members were even just chatting away; in the play reading group, the group leader and learning methods seemed invisible, members were just playing different roles and reading the words out, but they can get a great sense of achievement when they finish reading one play or several plays, and they can learn something from the plays: words, structure of a story, history, geography, psychology and even aesthetics, etc. The process of their learning activities show that learners in Sandwell U3A adopt informal learning.

For older learners, the quantity and the outcomes of their learning is not very important anymore, being in a physically and psychologically comfortable environment to “enjoy” the process of learning becomes more important for them. This was shown by the general observations. The Public is a warm, light, comfortable modern building, comparing to their previous site, which was described by the participants as “dark and cold”, The Public provides Sandwell U3A learners with physically comfortable learning environment. Also when attending group activities, the relaxing and stress free atmosphere makes learners feel psychologically comfortable. They may feel their contribution is important when speaking, which is a positive element to encourage them to join more learning activities.

How this environment is created depends on the group leaders themselves and the subjects. In the Latin class, the teacher used to teach a mixed-level of language learners in a grammar school. In this class, she divided members into four different groups according to their level in Latin and let them work in different tasks, but most of the time in that observed class, she spent much more time with the highest level group asking them to translate some sentences from Latin to English, and only set aside a little time to help the others, and this format was kept from the beginning to the end. Although this is probably not regarded as a good practice, because the group leader should divide her time equally between groups, however, in this setting, people in the lower groups appeared happy, content and benefited from the social contact without too much input of the leader. This clearly showed that a group organizer, even one who used to teach in educational industry, employs informal learning method to organize a group, which is very different from teaching in schools.

On the other hand, in the holiday Spanish class, the group leader’s method was more inclusive, he did not simply point to the board and teach. The class was divided into two parts: learning new words and reviewing. He used several different activities to help him fulfil his teaching goal in that class. For instance, when he organized members to review some Spanish words for parts of the body, he divided the whole group into two teams competing against each other, when he wrote down an already-learned Spanish word, the team that first spoke out the match English word scored, so it was an enjoyable moment for the members.

These two learning activities showed that the role of a group organizer is very important in older people’s informal learning environment. Under different

circumstances, the organizer in the Latin class tends to use self-directed and peer learning methods in the informal learning setting, whereas the organizer of the holiday Spanish class specifically focus on inclusiveness. These are important evidence for question two that informal learning is the general guidance for older people's learning, but it should be adjusted accordingly.

Issues raised by the interviews:

During the interview, the participants expressed their preference for learning Methods.

Patsy and her husband, David, expressed that, "you're learning all the time, you just come out of your house and you're learning, even when you're staying in the house and have the television on, and I like watching documentaries, so you're learning all the time, you never switch off. So adult learning at U3A encompasses all that, it's a way of life, the way I live. I'm always going to classes and things, I like it."

Alice and Lisa claimed that, "if you go on the excursions, you're learning something...I think a lot of people don't realize they're learning. It's not like sitting in school, in front of a desk, looking at the teacher. It's not formal learning, it's informal learning. You're learning by discussion, by looking, by reading, by preparation. All of those things come into it."

Also Paul and Nancy think it is a good way to learn about history by trips and visits; they do not like "being forced to look at a black/white board!" They also described the Scrabble group as "like being at school!" They do not like being spoken to "like a child!" They prefer to learn from each other—"it's an elderly way of learning." Additionally, they hope some outside speakers can introduce ideas and experiences that they might not have thought about.

All of these expressions from the participants emphasize informal learning for older learners. In the Literature Review I mentioned that Coombs (1985: 92) defines informal learning as "the spontaneous, unstructured learning" which can happen in and outside of the home. Informal learning is the most popular method for adult learning so far. From the opinions of the interview participants, they prefer learning in a relaxing atmosphere with no pressure of exams, it could be in the form of, according to them, mixed age learning, mixed level learning, library learning from books or learning from each other through discussion, etc. Also sometimes they need to go at their own speed and as Jane said, "it's very important that older learners can make their own choices." This indicates that older learners need to decide for themselves when and how to learn as well as what to learn. This emphasizes what Schugurensky (2000) describes as the most important aspect of informal learning—self-directed learning, alongside incidental learning and socialization. "Intentional and conscious" are the characteristics of self-directed

learning according to Schugurensky (2000), which means older learners know exactly what they want to learn and in what way. From my personal point of view the three forms suggested by Schugurensky (2000) actually could interact with each other. For example, some members of Sandwell U3A go to the lunch club for a meal, they could accidentally pick up some knowledge from each other which was not planned beforehand, and also this is a form of socialization. So the three internal forms of informal learning do not have clear boundaries, they could happen together or one after another depending on different learning settings.

In the interview, Jane and Nancy also expressed their learning preference of on-line learning, especially on YouTube as Jane mentioned. She is an amateur photographer now and picked up the photography skills on YouTube. With the development of technology, more and more people, no matter what their age, with internet access are capable of learning online, and this is also a good way to enhance ICT skills, especially for older learners.

David, Patsy, Paul, Nancy and Grace all expressed that they prefer mixed age learning groups, because "it is more stimulating", but John objected that he did not care about this, "I get less appreciative of younger people as I get older!" Also Alice and Lisa like learning in a mixed level group, they said that this is done at different tables, so you are really learning from the other learners at the table; but in contrast, Grace said that mixed level groups makes teaching and learning difficult! Either mixed age groups or mixed level groups is actually a way in which a leader organizes a group. When asking what kind of teaching method the participants expect in a class, Grace, who prefers "academic" learning environment, said that "U3As do not have a set curriculum, each teacher can write their own syllabus." Although she did not say it clearly, the implication seems to be she is not totally satisfied with the teaching, and "once a month classes is not enough for effective learning," she added later on. In terms of teaching methods, Grace and John said that the method varies according to the group leaders, and also they appreciate approachable, "expert" teacher who are willing to share skills and knowledge.

The above interactions between the participants clear show that, for the research question two, older learners employ informal learning as the learning method, but the group organizers need to make an effort in the way of organizing an activity to accommodate learners' needs.

Discussion:

From the analysis of observations and interviews, it is evident that the way of organizing an activity vary depending on the group organizers. This is mainly because of the nature of U3As, which are self-help organizations, so most of the voluntary group organizers are not professionals in the educational realm. Despite this, group organizers still need to design an inclusive curriculum to accommodate older learners'

needs which differ from the ones of younger people or youths. David and Patsy said, “people haven’t been in school for 50 or 60 years, if they left school at 15, like we did, now we are 75, and they hadn’t been in the classroom since, so to put them back into a formal school environment, it doesn’t work, they won’t come.” So it is important for group organizers in Sandwell U3A to create an informal learning environment for their members.

Informal learning is the main form for older learners. As mentioned in the Literature Review, Schuguransky (2000) states that informal learning often happens individually or in groups in a multitude of learning context, people can learn from books, media, networks and even their own experiences. The members of Sandwell U3A just learn this way. They have their own choices in what to learn and how to learn or in what way. As mentioned in the Literature Review, Knowles (1980: 43) defined andragogy as “the art and science of helping adults learn.” Informal learning could happen in a wider range of “visible” educational or “invisible” educational settings than formal learning, it could last throughout one’s life, so informal learning is a vital way for older learners.

3. How can more people at the same stage of life to be attracted to continue as lifelong learners?

Issues raised by the observations:

From the observation, I noticed that there is scope for further improvement in organizing learning activities. That means the organizer of a certain group needs to pay more attention to design the learning activity to accommodate the needs of the members of that group. Once learners’ needs are fulfilled, more members may come along. For example, in the Latin class, which is a mixed-level group as I mentioned above, the class was well-structured by being divided into four different level of groups, but the organizer did not spend her time equally between groups, only stay in one group most of the time in that observed class, so the other group members were self-taught, or just simply chatting with each other, so the organizer needs to spend relatively equal time between groups to help guide learners’ effort in language learning in the right way. In the music group, pieces of music were played after a brief introduction of the background of the music and its composers. If a period of time could be left for a short performance, in which the members who can play a certain musical instrument could be invited to play for the whole group, this group would be more enjoyable and creative. In the play reading group, if the organizer were not just letting the members take turns to read the lines of the script, but add “acting” to the class, this might attract more members to join in to try out their acting talents, and the members may increase from the current 5. Because according to the observation, the members were quite immersed when reading the lines of the play, they may have the potential for acting. The only exception is the holiday Spanish class. In this class, the organizer designed a series of activities to try to

involve all the members and they were really enjoying learning through different challenging or stimulating activities in every part of the class: the warm-up, the review as well as the learning new knowledge part.

It is crucial for the research question three to emphasize that it may be good for all the organizers from different groups in Sandwell U3A to get together to have a discussion on a daily basis, exchanging and sharing ideas about inclusive class design, to meet the needs of different members and increase members from a wider range of this area.

Williamson (2000: 49) addresses gender issues. He points out that, amongst older adults, more women than men participate in learning activities. I also found this in my observation (see Table 2).

Subject \ Gender	Music	History	Latin	Holiday Spanish	Literature	Play Reading	Tai Chi
Male	7	5	2	3	2	None	1
Female	17	11	9	6	3	6	4

Table 2: Numbers of male and female members in different learning groups.

(Group leaders are included as they are also members of Sandwell U3A)

Williamson concludes that gender difference in U3A membership reflects issues relating to retirement, marital status, social group membership and the feminization of U3A. Another reason why female members outnumbered male ones has emerged in my research. In the history class, when the lady was talking about her early school days, she said that her family let her leave school early to find a job to support her family. Four other female members agreed. After school years, some women may be “stuck” in family life, raising children and taking care of the whole family, so when they retired and got more free time, they would make an effort to realise their dreams of early years. The gender imbalance in participation of older learners should be considered for future research.

Issues raised by the interviews:

During the interview, the following opinions were expressed by the participants:

Nancy said that many older people are involved in caring for grandchildren so they get fulfillment in different ways, and she went on to say that the name may put people off—University is thought to be too “academic” that can sound “scary” for some people who have not been in education for a long time and deterred them

from learning. Also the use of “Sandwell” in the name can put people off as it is a modern, administrative unit and does not reflect the communities that people feel they belong to. According to Nancy, if the Sandwell U3A committee members want to make this organization thriving and flourishing, more specific and detailed things might be better to come to their consideration, even the name of the organization can have a subtle impact on membership.

Also Nancy and her husband, Paul, one is in her late 70s and one is in his early 80s and spent all their lives in West Bromwich, discussed the class issue in this area. West Bromwich is now a “working class town” as all the middle class people have moved away and “working class people do not want to learn.” Their point of view could not be judged right or wrong, but the region of West Bromwich is a working-class area indeed, so for the people in charge of Sandwell U3A now, it is important for them to find out the specific suitable ways of attracting working-class people to come into this U3A. Paul and Nancy also said, “51% of the population of West Bromwich are from Minority Ethnic groups,” so it is important for Sandwell U3A to find appropriate ways to increase members with diverse backgrounds. Also Paul added that the term “Third Age” is not clear for a lot of people that could be a hint for Sandwell U3A management team that they need to do more promotion to awake people’s awareness of learning after their retirement (the Third Age) and inspire or ignite older people’s passion for learning.

The issue of venue was raised by John, who is a member of Sandwell U3A, but he never comes to The Public for the monthly meeting and other groups. He only attends the Latin class as this is taught in a different venue. The reason is that the current venue of Sandwell U3A, The Public, has been a controversial and problematic site since its construction stage. Its process of development has been intricate and encountered financial difficulties, so when it was completed, some people in this region will not attend The Public and preferred the previous meeting room in a church, but other people did not like the old venue because it was “dark and cold”. It should be stated that although there are some issues here that are specific to West Bromwich, the general point about the importance of venue has general applicability, for example, it is easy to imagine that it would not be easy to attract some older learners of different ethnic groups to attend classes in a church, so an appropriate venue for U3A members to attend can be vital, especially in the aspect of increasing or decreasing membership.

During the interviews, participants also contend that it is very important to have a creative and effective Publicity Officer. Although Sandwell U3A has been quite successful at attracting new members, they are only replacing other members who have died or moved away, so the way of promoting Sandwell U3A could be varied and try to offer some solid help to those who have some specific barriers to attend. For example, Alice and Lisa say that some people are frightened to go out alone; there are people with physical decline in old age in this region; people who may want

to attend the U3A but unfortunately have no family support, these are really barriers to learning, but it is important for the U3A to offer help. On the other hand, Jane expressed the opposite opinion that she is not convinced that it is necessary to advertise as she does not really want the numbers at U3A to grow because it makes it more difficult to manage, she thinks it is already big enough.

The participants also made some suggestions towards government and policy makers during the interviews. Jane said that the nation's focus is now on health care rather than prevention, she seems to believe that "keeping active" is a prevention strategy, and attending U3A can contribute to that. Paul and Nancy spoke in an indirect way that "there is no consensus in the country". The implication might be that there is no agreement about what the policy on lifelong learning should be, so it is difficult to offer any advice or suggestions, but they think more could be done in terms of funding and promotion, and also encouraging learning could help in the fight against Alzheimer's Disease, which is also mentioned in the Literature Review by Millington (2010: 429).

What David talked about in the interview is very important for local government to consider. He said that the Sandwell U3A used to apply for fund (although he did not say clearly in what way they need the fund), but the funding agency asked them to demonstrate how the fund will benefit the community and how the project will succeed, but because of the nature of British U3A, the outcomes are not that important, but people learning for fun, so it is a paradox for them as they really need fund but cannot show the outcomes.

The opinions above are important for the research question three, as in the Literature Review, I mentioned that the British U3As are self-help organizations and Professor Laslett (1989: 228) also points out that U3As should not expect or seek funds from government, so it seems that increasing members in U3A is not the issue for government to consider, but it may be better for the two sides to cooperate, especially for the specific case of Sandwell, because of the socioeconomic background of it, Sandwell U3A needs support from the local government to help them facilitate to attract more learners.

Discussion:

After attending one committee meeting in Sandwell U3A, a committee member told me that they need to increase their members, as there are many older people outside the organization who have the ability to pay the enrollment fee, but they do not attend. Also there are some older people who cannot afford the fee, and if they do not even have internet access, they will feel lonely. It is urgent for Sandwell U3A to develop practical strategies to attract more older people in this area outside the learning community currently.

The above analysis shows that the ways to attract more older people to continue as lifelong learners could be done in a number of different ways. The key point for every U3A, not only for Sandwell U3A, to increase members is the quality of its classes and other activities. The current situation is that, in Sandwell U3A, most classes/activities may have scope for further improvement to meet the learning needs of the majority, so it could be useful if organizers could receive some professional training, but that needs support from national and local government.

In the Literature Review, I reviewed three reports in policy making about adult learning in the UK: the Kennedy Report (Further Education Funding Council: FEFC 1997b), the Dearing Report (National Committee of Inquiry into Higher Education: NCIHE 1997) and the Fryer Report (National Advisory Group for Continuing Education and Lifelong Learning: NAGCELL 1997). These reports mainly focus on post 16 education and adult training aimed at finding employment. To the extent of my understanding, few national level coherent policies have been made specifically for The Third Age learners (post 50), so more research about older learners or comparative research concerning learning of older people in different countries needs to be carried out to fill in the gap and provide possible and practical suggestions to national and local governments to create a more inclusive social environment for older learners from diverse backgrounds.

Chapter 5 Conclusion and recommendations

As the title of my dissertation is “Learning in the Third Age in the UK: motivators and challenges”, I paid special attention to older learners’ motivations and barriers in learning in Sandwell U3A.

1. Why do older people continue learning and what are the motivators and barriers for retired people in Sandwell U3A who wish to continue their learning after retirement?

The reason why older people want to continue learning has several aspects:

- a. Learning “for its own sake”: older people in Sandwell U3A like learning itself and find it enjoyable and can give them confidence.
- b. Learning for the quality of life: older people in learning are in an attempt to keep their brains going, active and stimulated. Learning can be a challenge for them to keep them from getting stagnant. Apart from the cognitive need, keeping physical active is also an important factor to motivate people learning.
- c. Socializing is also very important element for older people in this region to attend Sandwell U3A. It enables them to feel less isolated and provides the opportunities for them to learn through interacting with other members.
- d. Sandwell U3A can meet older people’s specific needs, for instance, theatre visits, practical skills training, etc.

The barriers that keep older people from learning can be the following:

- a. From the perspective of psychology, as people get nearer the end of life, they do not understand why they need to learn new things, because they will not be able to use it.
- b. Mental challenges can keep older people from continuing learning, for instance, memory is going, and not as good as it used to be.
- c. Physical problems are the other factor that limit the type of activities that older people can do.
- d. Economic problems—in the case of Sandwell U3A, doubling the fees may reduce the number of members, like Paul said, “many people of my acquaintance couldn’t afford to come here. Most people who attend come from ‘the wealthier parts of the borough’”.

2. What type of learning methods are suitable for adult learners in Sandwell U3A?

This study found that the main and popular learning method for members in Sandwell U3A is informal learning. They learn by ways of self-directed learning, incidental learning and socialization. From my observations and interviews, most people enjoy the learning atmosphere in Sandwell U3A, but people with higher expectation for learning would prefer a more “academic” learning environment and classroom organization.

3. How can more people at the same stage of life to be attracted to continue as lifelong learners?

I would suggest that to my question three, there are several ways could be done to help increase the number of members in Sandwell U3A:

First, to improve the quality of Sandwell U3A, in aspects of class organizing, the general management as well as publicity. The quality of class organizing is the most important one which may attract more people to come or keep people away from a group.

Second, to promote Sandwell U3A in this region properly, to inform people what a U3A is and in what way it can benefit the older people. Also it is vital to create a more open and inclusive environment for more members with diverse backgrounds to join in.

Third, to pay specific attention to some seemingly trivial aspects, but they really matter in some way. For example, the selection of all the classes offered in Sandwell U3A and the appropriate venue for all people.

Recommendations:

- a. Government should acknowledge the important work of U3As in keeping older people out of hospitals and care homes by reducing isolation and keeping them active. Practical support should be available to U3As to reduce problems of their members.
- b. It would be better to offer group leaders training in an educational institute when possible in order to help them design more inclusive classes for older people from diverse backgrounds.
- c. To update the information on the website of U3A regularly, make sure some older learners who cannot go to a learning community can learn online, also offering timely feedback from the group leaders or experienced learners to others or online

learners is an effective way in helping them continue learning.

d. The public transport should also be improved to encourage more older people to get out of the house and join a learning community.

As mentioned in the Literature Review, in 2012, the research conducted by the website of Ageuk (2013) showed that 800,000 people in the UK have turned 65. There are more people aged 60 and above than people under 18 now. So issues related to older people, especially to keep older people active physically and mentally, should be taken seriously by the nation.

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