Engagement of older adults in higher education: International perspectives from New Zealand and Scotland

BRIAN FINDSEN, UNIVERSITY OF WAIKATO

Abstract

This article explores the issue of older adults' access to and participation in higher education in two countries, Aotearoa New Zealand and Scotland. It discusses older adults' engagement with regard to patterns of participation and provision, using a critical educational gerontology approach. The two case studies, one in more theoretical terms, the other empirically-based, illustrate the complexities surrounding older people's engagement through the lens of a political economy. The paper argues for more proactive policies at both institutional and governmental levels to improve recruitment, retention and successful outcomes for older adults.

Introduction

Given the rapidly changing demographics in many countries towards increasingly ageing populations, for the first time in history large numbers of older adults in industrialised countries can reasonably expect to achieve a longer fulfilling life. Brought about by a myriad of factors – reduced fertility rates; better health schemes; more advanced technology – older people have better prospects of engaging in active learning in the third age, one arguably characterised by increased autonomy and leisure (Laslett, 1989). Equally, growing numbers of older people will experience severe poverty and deprivation as gaps between rich and poor increase under neo-liberal regimes (Estes, Biggs & Phillipson, 2003).

In this paper the primary focus is placed on how older adults engage with higher education in two countries: New Zealand where I have spent the majority of my life; and Scotland, where I was formerly employed as an adult educator in an ancient university setting. It needs to be acknowledged that the majority of learning undertaken by older adults – here arbitrarily defined as 55 years

or older – is carried out in non-formal and informal environments (Jarvis, 1985; Findsen, 2006). The virtual exclusion of older adults from higher education is a predominant international pattern (Glendenning, 2000). Here it is explained through a political economy approach where issues of social class, gender, and ethnicity intersect with age, producing multiple layers of marginalisation (Estes, 1991; Phillipson, 1998). Two case studies have been chosen to illustrate this marginalisation: first, older adults' access to Higher Education (HE) in Aotearoa New Zealand; second, a research project carried out for the West of Scotland Wider Access Forum examining the levels of engagement of older people with Further Education (FE) and HE in Greater Glasgow.

Patterns of participation for older adults in education

It is important to distinguish between patterns of participation in 'education' (i.e. organised learning, often by a provider) and 'learning' (entailing a broader range of activities, sometimes self-initiated). Within formal learning, older adults' involvement in mainstream adult education has not been commensurate with their percentage of the population (Carlton & Soulsby, 1999). Reports from the National Institute of Adult Continuing Education (NIACE) in the UK (see Learning to grow older and bolder, 1999; *Older people learning: Myths and realities, 2004; Demography and older learners*, 2005; What older people learn, 2008) continually demonstrate that the extent of older adult education has plateaued, if not decreased, at least in that region. The overall picture appears to be one of neglect, as identified by McGivney (2006).

An interesting exception in the British scene has been participation in the Open University (OU) where older adults constitute a significant majority of all older higher education students (McGivney, 2006). This suggests the mode of distance learning, including time convenience to participants, to be a significant factor in participation; recent popularity of SeniorNet provides additional evidence to support this claim. The general observation that "participation in learning declines with age" (Carlton & Soulsby, 1999) needs to be tempered by knowledge of the type of activity and preferences of older adults for locally accessible learning opportunities In addition, older people are not a homogenous group and older adults outside of the white middle-class mainstream are more at risk of having no real choice at all. If we analyse the heterogeneity of older adults – look at specific sub-populations within older adults – then we are likely to find that participation is strongly associated with previous educational experience, gender, race/ethnicity and social class (Findsen, 2006).

There has been prolonged interest in adult education generally and in older adult education in particular on models to explain participation and typologies to identify participation in learning activities. This is not the place to rehearse these well-worn debates. Suffice to add that among situational, institutional, informational and psychosocial barriers often mentioned, the last-mentioned are the most persistent and resistant to change. While older adults may eventually overcome mobility issues, poor public transport, unsupportive peers or unfriendly enrolment procedures, the major hurdle is often located within themselves. The notions that "you cannot teach an old dog new tricks" or "I am too old to learn" need to be discarded. While there is the need for societal changes in respect to overcoming negative stereotypes of older adulthood, educators can adopt more proactive stances towards out-moded cultural practices and moribund social and educational policy. National and local body policies which discriminate against older people need to be aggressively challenged.

An alternative framework: A political economy approach within critical educational gerontology

Several educational gerontologists have acknowledged the limitations of current conceptions of this field and have used critical theory as a basis for new developments (Battersby & Glendenning, 1992; Arber & Ginn, 1995; Phillipson, 1998, 2000; Cusack, 2000; Findsen, 2005). This new discourse about the education of older adults moves away from a functionalist tradition of adaptation of individuals to society to one which emphasises the agency of older adults, their collective capacity to empower themselves. Critical theory – an umbrella term for a range of radical education theories – provides the basis for such a critique of the status quo and the call for social action to empower older adults. Battersby and Glendenning (1992) have used the phrase 'critical educational gerontology' when they applied critical theory to educational gerontology. Amid Phillipson's (2000) typology, the political economy perspective acknowledges an awareness of the structural pressures and constraints affecting older people, the most obvious of which are gender relations, ethnicity and social class. In this framework it is also common to analyse the role of the state with respect to policies and practices which enhance or inhibit the ageing process. This approach also seeks to better understand the social and historical contexts of older adults' lives. In this perspective, older adults' access to higher education is couched in the social fabric and material conditions of their lives rather than viewed as an individualistic decision made in isolation from social context. From this viewpoint, the educational institutions themselves, as instruments of the Government, are not exempt from political and ideological forces that may influence older adults'

engagement with them. In this way, (non) participation among older adults is viewed from a macro perspective related to cultural patterns and social dynamics in the surrounding society Hence. it is possible to understand the meaning and experience of old age via an analysis of the distribution of resources in society in turn directed by economic, political and socio-cultural forces. In addition, social policy for or about the aged is also inextricably linked to these same material and ideological arrangements.

The following two case studies demonstrate the potential of a political economy approach to better understand older adults' engagement with higher education in two countries.

Case study 1: Higher education in Aotearoa New Zealand

The system of Higher Education (HE) in New Zealand reflects its colonial past in that the universities have been modelled from British antecedents (Dakin, 1992). New Zealand society is characterised by economic and political stability, a developing pluralism in terms of ethnicity (though officially a bi-cultural nation) and a fairly stable population of around five million people. Since 1987 the country has undergone significant neo-liberal reforms, the negative effects of which have been severely felt by the most vulnerable members of society such as Maori and Pacific nations' people, workers, many women and state beneficiaries. The gaps between rich and poor have widened and the social welfare and health systems are more fragile than they used to be after numerous restructurings (Kelsey, 1999).

In education, these reforms have had a major impact. Across all sectors of the education system (from early childhood through to higher education and adult education), the neo-liberal changes have induced what commentators (e.g. Olssen, Codd & O'Neill, 2004) have dubbed 'a cult of efficiency'. One manifestation of these changes has been increased attention to charters, strategic planning and quality management systems in a bid to strengthen 'quality' of provision. Another manifestation, more obvious in adult education, is the movement away from community development because it usually involves time and labour intensive activity towards greater focus on 'the enrolment economy' in institutions, including higher education.

The system of tertiary education (of which HE is the highest status component) has diversified considerably at the same time as the governmental reforms were introduced. Today there are eight publicly-funded universities (including a new

university of technology, previously the largest polytechnic), 20 polytechnics or institutes of technology, three *whare wananga* (houses of advanced learning for Maori) based in the North Island and several hundred Private Training Establishments (PTEs). Some examples of PTEs include language institutes, religious-based training organisations, travel and tourism, and commercial/secretarial colleges.

For most New Zealanders, including older adults, tertiary education is still most closely identified with universities and polytechnics. The advent of *whare wananga* reflects the need for indigenous Maori to have an alternative education strategy for their people based on the principle of *tino rangatiratanga* (self-determination), enshrined in the Treaty of Waitangi (signed between Maori and the Crown in 1840). This alternative system controlled by Maori (funded mainly by the State) aims to operate from the cradle to the grave.

Many older adults are not attracted to HE as they feel somewhat alienated from its ethos of competition, credentialism and formality. In the following section a brief explanation is offered of some macro level factors that tend to work against the access and participation of older people in HE. (For a fuller explanation readers are directed towards Findsen, 2002).

Explanations from this perspective can entail the relationship of the state to (older adult) education and analysis of social stratification according to social class, gender and ethnicity. In this instance, only the role of the state and ethnicity will be examined.

The higher education institution as part of the state
Institutions of higher education are part of the state's apparatus in disseminating traditions, values and ideologies. The few older adults who frequent higher education are primarily from white middle class backgrounds, typically with solid educational credentials. Their involvement tends to be in the arts, humanities and social sciences rather than in more vocational or technical programmes; more women than men enter the universities. This trend arguably is to be expected, given the observation that most learning in older adulthood is expressive rather than instrumental (Pearce, 1991).

The institutions of higher education represent a state apparatus in which prevailing cultural trends – such as neo-liberalism – are promulgated. Ironically, higher education itself has suffered as a result of these same reforms: there is

proportionately decreased spending by the State on education; increased staff:
student ratios have arisen so that teachers deal with larger classes and increased
workloads; greater contestability for research funds occurs. Currently, the
universities are preparing for the 2012-2013 round of the Performance-based
Research Fund (PBRF) striving for the favoured position in terms of research
outputs, akin to the former Research Assessment Exercise in the UK. While uni-
versities are permitted by statute to be 'the critics and conscience of society' they
more commonly acquiesce into being the primary vehicle for acculturation of
future generations in reproducing dominant ideologies.

In line with the UK, tertiary education in New Zealand has been re-occupied
with widening participation and the massification of the system (Stuart, 2000).
The country has previously prided itself on open entry to universities so that
mature students could enter with minimal qualifications and try themselves
out. Times have hardened considerably. Entry standards to university have been
more rigorously enforced under 'managed entry' reforms and older people now
find it more difficult to gain entry to credit studies. In addition, the reality of the
stratification of knowledge between and within tertiary education institutions
in New Zealand, though nowhere as marked as in the UK, nevertheless is a fac-
tor impacting on older adults' preparedness to enter such institutions.

Ethnicity
In the New Zealand scene the vast majority of people identify themselves as
European or Pakeha. In many places in this small country, especially in the
south, the population of five million is quite mono-cultural in its outlook,
despite the country's official position as a bi-cultural nation where both Maori
and English languages have equal status under the law. This mono-cultural out-
look is severely challenged in the larger North Island cities where many different
peoples live and where different languages are spoken. Especially in Auckland
(where one third of the New Zealand population lives), there is a multi-ethnic
reality. This is primarily a result of heavy Maori migration to the cities in the
1950s/1960s and comparable immigration from the Pacific Islands mainly in
the 1970s. In the most recent decade, more South-East Asians have settled in
New Zealand, particularly in Auckland.

Marginalisation is experienced by Maori and Pacific nations' peoples in most
institutions, including education. While social equity programmes have been
introduced by universities and polytechnics to provide access to higher educa-
tion, there is still a major struggle for sizeable proportions of indigenous peo-

ples to gain access and then complete degrees. Where programmes have been successful, the ownership of these initiatives has been in their own hands. For example, *whanau* (extended family) groups established in higher education, where Maori students have provided one another with on-going academic and social support as a collective, have had positive outcomes. This observation pertains mainly to younger and mature-aged Maori since older Maori (especially men) are noticeably absent from Pakeha-dominated higher education.

A solution for Maori has been to establish their own parallel education institutions where a Maori ethos and Maori knowledge are valued and legitimated. From *kohanga reo* (language nests) at early childhood to k*ura kaupapa Maori* (primary and secondary schools) to *whare wananga* (adult and higher education), Maori have taken control of their own knowledge, emphasising those aspects which will enable them to survive in a bi-cultural nation. The role of older adults in the traditional Maori context is generally well prescribed in terms of gender specific roles and there is a respect and treasuring of older people admired by other more individualistically-oriented communities. But in the modern urban context, this traditional leadership pattern has become fragmented and the situation for older Maori has become more ambiguous.

While in this case only ethnicity has been discussed, the obvious point to be made is that it interacts with other factors such as social class and gender compounding the situation for the marginalised, especially older people.

Case two: Higher education in Scotland – a research project in the west of Scotland

Scotland is a nation which is continuing to strive for its own identity, having in its past had many battles with England in terms of self-determination. It is a country of nearly six million with a slightly declining population (as young people are often attracted to London or beyond). It has a new Parliament in Edinburgh with some devolved powers from Westminster, including education. The population is largely mono-cultural though there are increasing numbers of new immigrants and asylum-seekers.

The phrase Higher Education in Scotland refers to 13 universities, quite distinct from further education colleges of which there are at least 45. (In addition, there are number of Higher Education Institutes (HEIs) such as the Glasgow College of Art). There is a strong demarcation between the universities in Scotland in terms of social stratification – the ancient universities (e.g. Glasgow); the 'mod-

ern' institutions of the 1960s (e.g. Strathclyde); the post 1992 institutions, as converted polytechnics (e.g. Glasgow Caledonian University). This is a significant factor because in terms of their general intake of students, the ancient institutions tend to have first call on the 'best' students from high schools; unsurprisingly, the 'new' universities have tended to attract more of the non-traditional students, including 'returnees', more typically mature-aged women (Thomas, 2001; Layer, 2005). Little is known about older adult recruitment into universities in Scotland but it has been supposed that most older adults undertake non-credit courses rather than programmes leading to a specific qualification. The research project below severely challenges this belief.

Social inclusion and the research project

One of the major agendas in higher education in Scotland has been the ambition to achieve 'social inclusion' of previously marginalised learners. In universities and further education colleges alike, the move towards widening participation has been accelerated, aided by initiatives from the Scottish Executive. In this vein, I sought funding from the West of Scotland Wider Access Forum (West Forum), a catalyst for integrating wider access in both FE and HE. The research project has now been completed (Findsen & McCullough, 2008).

This two-phase research project (literature review, followed by a longitudinal study) focussed on older adults' engagement with FE/HE in the West of Scotland. The concentration was on older adults' educational journeys, thus connecting with a group in society historically excluded from formal provision (especially in credit programmes). The study provides insights into the educational experiences of older adults (here defined as 50 years and beyond) as they negotiate formal education in FE and HE contexts. The stories of these participants (biographies) intersect with key objectives of West Forum: analysing information and guidance for students; identifying barriers and incentives for continuing study (retention); and investigating benefits for them in completing a programme (constituting one main element of 'success').

The aims of the project included:

- To provide a comprehensive literature review of older adults' (dis)engagement with formal education institutions in the West of Scotland (linked to UK and international trends of older adults' participation in education).

- To provide through a case study approach two major perspectives of older adults' connections with FE and HE (i.e. perspectives of learners; perspectives of the institutional providers) in the West of Scotland.

- To examine the ways in which formal learning opportunities relate to the wider realm of older adult learning (including non-formal education).

- To track the educational journeys of selected groups of older adults over a period of two years, focussing on their issues emerging from life as older students.

- To investigate selected FE and HE institutions' attitudes and practices in the West of Scotland towards older adults' participation.

Initially, a literature review was undertaken to summarise and critique pertinent studies, policies and empirical research related to older adults' recruitment, retention and 'success' in formal education (both credit and non-credit). This involved a wider search than just Scotland as participation trends need to be analysed from global perspectives but still retain a main focus on local conditions.

In the second phrase of empirical research, selected localities and adjacent institutions (FE/HE) were selected as case studies. Both HE (3) and FE (4) institutions were included. The project tracked 85 students over a two-year period to ascertain their learning experiences and connections with the participating institution(s) via face-to-face interviews and focus group meetings. Given that the focus of West Forum was upon the learning needs of people in 'the highest deprivation zones' within the West of Scotland, the intent of the research team was to gather data from individuals and selected institutions where multiple disadvantage could be found. The interest of West Forum in funding this project was that it targeted a non-traditional group of learners (older adults) in the poor areas in and around Glasgow city.

Some of the major outcomes for the study were as follows:

In line with the work of Schuller et al (2001), benefits of learning were identified in varied categories.

- *Physical and mental health*: for many students, participation arose in response to a necessary reorganisation of a life schedule (e.g. bereavement). An improvement in health was closely linked to commitment to studies.

- *Intellectual stimulation, competences and skills*: the notion of 'keeping the brain alive' was frequently reported. While intellectual challenge was valuable for itself, for many respondents it fostered a profound sense of achievement too.

- *Quality of life, empowerment and self-confidence*: these improvements were aligned to satisfaction of achievement, in learning something they had previously deferred, understanding new subjects and the transferring of knowledge into different life areas.

- *Personal and social values and networks*: participants reported benefits in terms of changed meaning perspectives (see Mezirow, 2000) and stronger social networks.

- This expanded network also related to more effective inter-generational learning, usually between grandchildren and grandparents (sometimes online). At times, this learning consisted of the older person providing academic advice to youngsters or young people seeking knowledge from older people.

- Later life learning assisted many participants to deal with crises or transitions (e.g. ill-health of self or partner). Education provided a source of hope for those un- or under-employed to gain respectability in the workforce, more particularly for men.

- Institutions (more often FE colleges than universities) with out-reach sites provided much needed access for less mobile older adults to continue to study.

- Funding by the Scottish Government (via either fee waiver schemes or through Independent Learning Accounts (ILAs) implemented by the institutions) enabled large numbers of the participants to afford to study.

Discussion

The two case studies above, one more theoretical, the other empirical, do have much in common from a critical gerontology perspective. The common focus on how older people negotiate the complexities of higher education, typically a rather remote arena for them, is a common thread. Both studies are concerned with the plight of older adults in a state system of university provision and the extent to which older people, especially those from disenfranchised groups, can

find ways of getting into the institutions and completing their programmes of study. Higher education is part of a stratified society and while widening participation initiatives have had a modest impact on diversifying the student base, much remains to be done to attract, retain and encourage greater success for older students in both countries.

In the New Zealand case it is necessary to understand the wider political-economic reforms in society to appreciate the difficulties facing older people who want to enter universities. Even for those older adults who have benefited most from the education system in the past, it is a challenge to retain one's determination to 'get through' the system. These people, usually white and middle class, have the necessary 'cultural capital' (Bourdieu, 1974) to succeed or alternatively set up their own system such as the U3A movement which has blossomed in New Zealand (Swindell, 1999). Since the global economic crash, the HE sector has tightened its entry requirements, making the 'open entry' of the past an almost unattainable goal. Indeed, if you are an older Maori woman living in a rural area it is highly unlikely that you will ever find your learning path leading to a university. If you are a Pakeha male from a professional background, you will find the journey less daunting. To gain respect from Maori communities, universities will need to recruit more staff of Maori heritage plus adopt a willingness to innovate to make the individualistic orientation of the institution into a more collectivist one, less scary for marginalised adults.

In Scotland the same kind of political economy analysis applies. The 'socially excluded' in Castlemilk or Easterhouse of Glasgow (poor suburbs) will find the University of Glasgow, for instance, with its ancient history of recruiting students from the élite, a road too far unless progressive and innovative steps are taken to target and welcome students, including older adults beyond the mainstream. The recent 'downsizing' of the former Department of Adult and Continuing Education does not suggest an optimistic future. Many older adults have come into this University via Access programmes or the Certificate in Higher Education. The above research project, with its focus placed on older students from mainly working-class backgrounds who have had minimal association with FE and HE earlier in their lives, demonstrates the considerable demand for both credit and non-credit programmes if conditions are even mildly conducive. It illustrates the potentiality for HEIs to recruit from older people if they practise real social inclusion in their strategic plans.

Conclusion

One of the main arguments in this paper is that those few older adults who do engage with higher and continuing education in universities are the already privileged, predominantly white middle class women. Participation patterns of older adults need to be analysed from the viewpoint of social class, gender, ethnicity, geographical location and disability, in addition to the role of the state. This paper has offered an unapologetic analysis of the disenfranchisement of older adults from formal education in higher education contexts but indicates that older people will engage more fruitfully if the political will exists at both institutional and governmental levels. This argument is one based on a radical stance emergent from critical gerontology.

The two case studies illustrate that a political economy approach can provide a hardened analysis to understanding the circumstances and life chances of older learners, particularly with regard to universities in two Commonwealth countries. While there are idiosyncratic characteristics of respective higher education systems and nations, the historical situation of older adult engagement in relation to universities in both locations has been tenuous. While older people may come to occasional short non-credit courses, principally of the expressive liberal education type, historically there has been not much engagement beyond this level. Given changing labour market conditions and recent anti age discrimination law in both countries, there may be renewed impetus for more instrumental education as older people seek to re-engage with education to help diversify their options. The virtual exclusion of older adults from higher education may in part be remedied by a decline in the numbers of school-leavers coming to universities but this seems more of a default mechanism than it is an institutional belief in the importance of lifelong learning. There needs to be a continuing demand for the rights of access of older people to higher education and at the same time an enhanced readiness by the institutions to accommodate these senior citizens.

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