Hitting the Target

an exploration of points of return to learning, of those who have not participated for many years

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NIACE (the National Institute of Adult Continuing Education for England and Wales), established in 1921, works to encourage more and different adults to engage in learning of all kinds. NIACE aims to improve opportunities for adult learners across all sectors with a particular focus on those adults who are least likely to have benefited from previous engagement with learning. In 1985 NIACE Dysgu Cymru (NDC) was created to undertake the work of NIACE in Wales. It is supported financially by the Welsh Assembly Government (WAG) Welsh Local Government Association (WLGA), members’ subscriptions, the European Social Fund, a variety of sponsors and through project and research work funded from a range of sources.

Since 2003 part of NDC’s work, the Older and Bolder programme in Wales, has supported the Welsh Assembly Government Strategy for Older People and focussed on promoting the value of engagement in learning for older people. It was work carried out under this programme that led to a proposal to undertake this study.

Acknowledgements

We are grateful to the Esmeé Fairbairn Foundation for its support which enabled the training of volunteer researchers and supported the involvement of older learners.

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Summary

*Hitting the Target* is a qualitative research project, funded by the Welsh Assembly Government Department for Children, Education, Lifelong Learning and Skills with additional support from the Esmée Fairbairn Foundation. It aims to improve understanding of the specific actions and mechanisms, as distinct from underlying motivational factors, that have directly spurred individuals who have not been involved for many years, to take up learning opportunities. The *Hitting the Target* project, sought to answer the question: what actions, by whom and in what context, actually spurred the individual to take action and return to learning? The aim is to provide evidence based suggestions for engagement, and recruitment practices that can be employed by learning providers and others.

A review of literature was carried out and briefly summarised on the participation of adults in learning and models to explain their motivations to learn. The research was based on the narratives of those who have successfully returned to learning after not participating for many years. These narratives were collected at a series of events. They were analysed, the actions and interactions taking place around the point of return noted, and then grouped thematically providing evidence to develop the suggested model for understanding the mechanisms involved.

The most striking characteristic of the narratives of the individuals who took part in the study is the significance of discussing opportunities with someone prior to returning to learning. This could be a family member, a friend or familiar professional within a familiar local environment. The discussion was then a prompt to taking action to seek out an opportunity. The study has also emphasised the importance of understanding the concept of learner identity and how that affects engagement.

Six recommendations are made based on the findings of the study:-

1. Professionals working with older people should be made aware of the benefits of learning to older people and of the role they can play in facilitating engagement in learning

2. Support should be given to schemes that encourage community members and other learners to play a voluntary part in recruiting and supporting new learners. Schemes such as the Rise Learning Advocates, WEA Community Learning Reps and the Wales Adult Learners Network could be highly influential and effective in engaging new older learners
3. Support should be maintained for local activity that promotes local learning, particularly those promotional activities that allow opportunities for informal discussion e.g. learning festivals and open days.

4. The potential role for family and friends in encouraging older people to return to learning should be made clear to those promoting learning and to a wider audience. This could be achieved through:-

- Including appropriate narratives of influence within the stories of successful learners used within the current promotional campaigns

- Using appropriate stories in a targeted way

- Creating a specific campaign such as “bring a friend/family member to learn day”.

5. A particular focus on intergenerational approaches to recruiting new older learners should be developed for use within the context of Community Focused Schools

6. Training or guidance materials on encouraging older learners and based on this study should be made available to support all recommendations.
1. Introduction

In his digital story My Magic Box\(^1\), made at the age of 73, John Morris from Rhondda Cynon Taff described himself as:

"... a barely literate 11+ failure who left school at 14 without even a swimming certificate and a lifelong hatred of schools and learning"

In this sentence John shows three of the most common characteristics of the non-learner. Older people, those who left school early and particularly those with no qualifications are much less likely to engage with learning as an adult. As he described so vividly in his story at age 69, John had done no learning\(^2\) since leaving school. For his 70\(^{th}\) birthday he was given a computer which, together with some community education classes, changed his life. He studied not only information technology, but family history and creative writing. Every year at the Inspire! Adult Learner Awards ceremony in Wales there are similar stories of a new engagement with learning after many years away from it; stories that demand further investigation to provide deeper understanding. This study is a quest for such understanding.

*Hitting the Target* is a qualitative research project, funded by the Welsh Assembly Government Department of Children, Education, Lifelong Learning and Skills with additional support from the Esmeé Fairbairn Foundation. It aims to improve understanding of the specific actions and mechanisms, as distinct from underlying motivational factors, that have directly spurred individuals into engagement in learning activities after many years’ lack of involvement. The *Hitting the Target* project, sought to answer the question: what actions, by whom and in what context, actually spurred the individual to take action and return to learning?

Individuals with the required learning history were recruited to attend data capture events in different parts of Wales. Using a narrative approach, information was collected from participants about their successful return to learning. The narratives were analysed with a particular focus on details surrounding the actual point of return. Based on the review of literature detailed below, a model is

\(^1\) Available to view @ www.niacedc.org.uk

\(^2\) In this study the term learning is taken to be a conscious attempt to learn through a course (accredited or not) or self directed learning in a group or as an individual as acknowledged by the learners themselves.
suggested that will support the development of practical guidance by improving understanding of the mechanisms involved.

Information was also captured on the characteristics of supportive practice that ensures successful learning and provides rich data suitable for further analysis with different research questions.

This study will be of particular use to those wishing to attract older people to engage with learning activities, however, a precise definition of ‘older’ was not felt to be appropriate, ‘older’ is after all a relative term. A participant in the Gwanwyn Festival Celebrating Creativity in Older Age said “.... for a professional dancer, 40 is older!”. However, Mary Wesley became a newly published author at 74. The Strategy for Older People in Wales engages with people of 50 years and over and the Commissioner for Older People in Wales works with those who are 60 and over. The model offered can be considered as applying to a set of circumstances more likely to be encountered in later life than at any particular age.

1.1 Purpose

The purpose of this research is to improve understanding of ways to encourage older adults to take part in learning, with a particular focus on those who have not engaged for many years. It aims to identify techniques for promoting learning to older people and prompting their engagement. There is considerable research on motivations to return to learning and on the multiple barriers that some groups face, and these are examined below. This research focussed more specifically on the learner’s experiences at the point of return to learning, following a long period during which involvement in learning has been absent.

The intention is that such stimuli experienced by the research subjects will provide pointers to practice that can be exploited more widely in improving the promotion of learning to those not currently learning. The aim is to provide evidence based suggestions for engagement, and recruitment practices that can be employed by learning providers and others.
1.2 Context

1.2.1 The benefits to older adults of engagement in learning
Engagement in learning is beneficial to many aspects of life and across the whole of the lifespan. Encouraging older people in Wales to take up learning opportunities is of benefit to them as individuals and to the social and economic fabric of Wales.

Research evidence illustrating this has been growing rapidly over the last decade or more and has been well summarised by others (Connolly et al 2008, Feinstein et al 2008). The essence of those wide ranging benefits is eloquently captured in the principal report of the Inquiry into the Future of Lifelong Learning:

Our vision is of a society in which learning plays its full role in personal growth and emancipation, prosperity, solidarity and global responsibility. We believe that learning is intimately connected with the achievement of freedom of choice, control over individual and group destinies, health and well-being, cultural identity and democratic tolerance. (Schuller & Watson, 2009, p1)

In addition to contributing to the economic wellbeing of individuals and the economy, a review carried out on behalf of WAG (Spear, 2009) confirmed the wide ranging impact of adult learning and identified its contribution to no fewer than 18 WAG strategies. Participation improves physical and mental health, well-being and the take up of health improving behaviours; encourages social cohesion, reduces social exclusion and encourages social justice (Feinstein et al 2008) and contributes to positive ageing (Carlton& Soulsby, 1999). Learners themselves report a range of personal development benefits from their engagement in learning.

The most frequently cited benefits for learning were around personal development: 32% of learners believe that they have developed as a person, 31% said that they felt as though their communication skills had improved, 29% reported improvements in self-confidence, 25% have gained or expect to gain a recognised qualification and 20% have met new people and made new friends. (Aldridge et al 2008, p21)

1.2.2 Capitals and Lifelong learning
Drawn from economics and adding to the long understood idea of financial capital, the notions of human, social and identity capitals have emerged to provide a model for understanding behaviour, ‘success’ and ‘failure’ amongst other things. Human, social and identity capital are intrinsically linked to learning

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3 Full details of the work of the Inquiry into the Future of Lifelong Learning are available at http://www.niace.org.uk/lifelonglearninginquiry/default.htm
and Schuller and Watson have set them as the three points of their triangular “framework for thinking about the purposes and benefits of lifelong learning” (2009:15). They argue that education and learning contribute to all three, and that stores of all three are needed to make use of each.

Broadly, human capital refers to knowledge skills and qualifications and social capital to norms, networks and relationships. Identity capital, a concept developed more recently refers to self-esteem, self efficacy and a sense of purpose in life. Côté and Levine (2002) argue that conceptualising identity capital offers additional understanding of how individuals with similar stores of human and social capital are more or less successful, and suggest that this is important given the collapse of traditional education and labour market trajectories. Earlier Côté explains:

Most generally, the term “identity capital” denotes what individuals “invest” in “who they are”. These investments potentially reap future dividends in the “identity markets” of late modern communities. To be a player in these markets, one must first establish a stable sense of self which is bolstered by the following: social and technical skills in a variety of areas; effective behavioural repertoires; psychosocial development to more advanced levels; and associations in key social and occupational networks.

(1996:425,426)

It has been argued that while education is in itself of particular importance in the formation of identity capital (Preston, 2004) it is also useful in making use of skills and knowledge acquired. According to Schuller and Watson:

Without the self esteem that makes up identity capital, it is difficult both to learn and to apply that learning. (2009:16)

The suggestion that learning which supports the development of identity capital may be more important when people spend less of their lives in paid employment is particularly important in working with older adults. McNair suggests that many older people are engaged with “meaning making” activity through learning and that the increase in the population of older adults should demand a greater focus on learning that builds identity capital (McNair, 2008)

1.2.3 Participation in adult learning

The most recent NIACE report on adult learning participation in Wales showed a trend towards increased participation since 2003(Aldridge et al, 2008). However, the 2008 survey showed 54 per cent of the adults questioned said they had not done any learning in the past three years and more than half of those, (29 per cent of the total), said they had done no learning since leaving school. In addition,
26 per cent of those surveyed said they were very unlikely to take up learning in the next three years.  

NIACE’s UK wide annual survey results indicate that participation in adult learning is linked to socio economic class, with those in the highest groups (ABC1) significantly more likely to be participating than those in the lower groups (C2DE). In 2008 in Wales, 70 per cent of those in the lowest socio-economic groups (DE) were also unlikely to take up learning in the future. Participation in learning declines with age and whilst the percentage of those aged 65+ participating in learning increased from the 2007 survey, at just 12 per cent participation(Aldridge et al, 2008), there is considerable scope for greater engagement.

A previous survey (Aldridge & Horrocks, 2003) describes further factors that are also significant in considering older people’s engagement in learning. Those not working were roughly half as likely as those in employment to be learning. Other studies have shown that those who have not extended their learning beyond compulsory schooling are less likely to participate in learning as adults:

There is a key divide between those who leave school at the earliest opportunity and those who stay on even for a short while. Only 32% of those who left school as early as possible are current or recent learners, compared with 53% of those who stayed on beyond 16.

(Aldridge & Horrocks, 2003)

Educational achievement, school leaving age and previous participation in training were noted as being characteristics that identified long established groups under-represented in learning (Maguire et al, undated :7).

Amongst the large groups of adults reported as under-represented in adult education, McGivney (2001) lists:

- Those with poor school experiences;
- Those on low-incomes, or receiving benefits;
- People who are out of or, on the fringes of, the labour market;

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4 Data on participation in adult learning in England and Wales has been collected by NIACE during the past two decades. In some years funding allowed a boosted weighted sample of 1,000 interviews in Wales to provide a distinct report for participation in Wales, 2008 was such a year.

5 Unemployed, not working or retired
• Part-time employees;
• People with disabilities; and
• Older people,

who, in addition, are also likely to feature in all the other groups listed.
1.2.4 Motivations to learn

Many studies have investigated what motivated adults to learn, although a smaller number have focussed specifically on older learners’ motivations.

Sargant (1997) categorised adult learner motivations broadly as:-

- Related to work
- For personal development
- Related to education and progression

The first is clearly an important factor with 7 in 10 learners surveyed in Wales (Aldridge et al 2008) giving this as one of their reasons for taking up learning. Whilst work remains a motivating factor for older learners, its significance changes with age:

<table>
<thead>
<tr>
<th>Motivation</th>
<th>45-54 %</th>
<th>55-64 %</th>
<th>65-74 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am interested in the subject/personal interest</td>
<td>30.6</td>
<td>42.4</td>
<td>51.1</td>
</tr>
<tr>
<td>I enjoy learning/it gives me pleasure</td>
<td>19.8</td>
<td>29.8</td>
<td>53.4</td>
</tr>
<tr>
<td>To improve my self confidence</td>
<td>11.6</td>
<td>7.6</td>
<td>13.8</td>
</tr>
<tr>
<td>To meet people</td>
<td>5.6</td>
<td>7.6</td>
<td>15.5</td>
</tr>
</tbody>
</table>

Rising citation of motivation to learn

<table>
<thead>
<tr>
<th>Motivation</th>
<th>45-54 %</th>
<th>55-64 %</th>
<th>65-74 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>To help in my current job</td>
<td>38.6</td>
<td>25.1</td>
<td>8.0</td>
</tr>
<tr>
<td>To develop myself as a person</td>
<td>29.0</td>
<td>27.6</td>
<td>19.6</td>
</tr>
<tr>
<td>To get a recognised qualification</td>
<td>20.7</td>
<td>9.1</td>
<td>4.6</td>
</tr>
<tr>
<td>To make my work more satisfying</td>
<td>16.8</td>
<td>12.8</td>
<td>5.5</td>
</tr>
</tbody>
</table>

Falling citation of motivation to learn

Taken from Aldridge & Tuckett 2007 commenting on the NIACE 2005 UK wide participation survey

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7 See for example, Adair & Mowsesian 1993, Scala 1996 and Dench &Regan 2000
‘To meet people’ is likely to be well understood by all as a motivational factor for returning to learning. However, other factors that are shown to be of increasing importance to older learners are likely to be less well understood by those who have had poor experiences of learning in the past. They may have an interest in a subject or issue but are less likely to have enjoyed the experience of learning and may well feel that it knocked their confidence.

To older people who participate, the value of learning is clear, especially for personal development, both in terms of personal growth and satisfaction. This includes notions such as ‘enrichment’, ‘enjoyment’, self-satisfaction’ and ‘sense of accomplishment’ (Scala, 1996). Learners in this study also spoke of wanting to keep their brains active, of enjoying the challenges of learning new things and of wanting to learn about things that interested them. The challenge, however, is to engage others who are silent about these things and not yet involved.

### 1.2.5 A typology of learners

Further understanding of participation in learning, has been sought by considering the patterns of engagement in learning across the lifespan, and collecting together characteristic trajectories to produce a typology of learners. Notably, in Wales, a survey of over 1000 households in the industrial valleys of the south led to the following typology:

<table>
<thead>
<tr>
<th>Category</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disaffected learner (non-learner and near non-learner)</td>
<td>31%</td>
</tr>
<tr>
<td>Delayed learner</td>
<td>18%</td>
</tr>
<tr>
<td>Transitional learner</td>
<td>17%</td>
</tr>
<tr>
<td>Immature learner</td>
<td>5%</td>
</tr>
<tr>
<td>Lifetime learner</td>
<td>30%</td>
</tr>
</tbody>
</table>

*Gorard et al 1997: 18*

It drew on the accounts of the “previously ‘invisible’ third of the population” (Gorard & Rees 2002:viii) who say they have never been involved in any education or training since leaving their initial schooling, often at the first possible opportunity. These *disaffected* learners along with those they categorised as *delayed* (Gorard et al 1997) are the interest of this study.

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8 A delayed trajectory is described as having returned to at least one substantive episode of education, after a gap and after having made the transition from school to work (Gorard & Rees 2002:45)
1.2.6 Encouraging new and different learners

A recent NIACE Dysgu Cymru study reported many examples in Wales of projects successfully recruiting and supporting individuals with multiple barriers to learning, often considered as “hard to reach” groups (Mackay & Furlong, 2009). Frequently this is achieved through highly targeted provision, an approach noted as successful by McGivney (1999). These targeted projects are funded from a range of sources, frequently offering a curriculum that is finely tailored to the needs of the target group.

In order to promote learning more widely across the population to recruit new learners in Wales, a marketing approach has been developed through national campaigns including NIACE Dysgu Cymru’s Adult Learners’ Week. The overall approach is to promote learning in general rather than specific opportunities. The tactics used to attract non learners to opportunities are similar to those used in marketing a new product. The challenge, in this case, is to communicate the benefits of learning to a target group who may well have poor experiences of learning in the past. To those in the ‘target group’, ‘learning’ can be thought of as a new product.

A commonly used communication model is known by its acronym AIDA (Attention, Interest, Desire, Action\(^9\)). In Wales, the NIACE Dysgu Cymru national campaigns seek to provide the first two stages: attracting attention to, and providing interest, in learning. By working with local partners in Learning Festival Groups, the annual Adult Learners’ Week activities attracted over 21,000 learners in each of the past two years. Analysis of participation forms collected at the activities shows that around half of participants say they have little or no background in education. Around 80 percent of the individuals attracted to the events, through national and local publicity, are over 55 years of age. Also of interest is that evaluations of these kinds of campaigns consistently demonstrate that around 40 per cent of participants are engaged through “word of mouth” and have not been conscious of other advertising or publicity. This study offers the opportunity to investigate this finding more closely and to provide local partners with different insights into the effectiveness of locally based promotional activity on attracting new learners.

\(^9\) Further details @ http://learnmarketing.net/glossary.htm
2. Study method

2.1 Research approach

The approach taken to this study is deliberately an ‘appreciative’ (Cooperrider, 1995) focussing on examples of success from which to learn and to develop practice. We sought to explore the detail of individuals’ experience of returning to learning in order to replicate the mechanisms to encourage other returners and also to gain understanding of the social processes in action.

2.2 Research participants

Participants were recruited by advertising through networks of adult learning providers, of organisations working with older people and the Wales Adult Learners’ Network. We described the participants we required as “having successfully returned to learning after a long gap” and stated that we wished to learn from their experiences. Individuals were invited to put themselves forward to attend one of four events in different parts of Wales. A short questionnaire was used to ensure that research participants had the required learning history. Out of pocket travel expenses were offered, in order to facilitate participation. We had expected that the majority would be older people though we did not exclude younger learners with an appropriate profile.

We were seeking examples of particular experience rather than a sample representative of the population. However, the final cohort of 84 research subjects offered a broad cross section of adult learners with a greater number of older learners, as shown in figure 1. They were drawn from all parts of Wales, from urban and rural settings and both full-time and part-time learners were included. They came from higher education, further education, local authority adult community learning as well as from organisations in the voluntary and community sector and in the workplace. Two thirds were female and only one individual described themselves as from the BME community.
2.3 Data capture

Four data capture events were held which included several sessions of facilitated activity within a day. These consisted of small and large group work and individual reflection prompted by the questionnaire. Two shorter focus groups were held to accommodate volunteers that could not attend the main events and to ensure participation from North West Wales and from the further education sector.

The data used in this report was collected as narrative. In order to capture a large number of narratives that were closely focused an exercise called a ‘storycircle’ was used. Groups of about 8 participants were facilitated by a researcher (see table 1 for detail). Volunteer research assistants were recruited to support the facilitator, to provide a modelling of the storytelling by telling their own stories and to reduce facilitator influence of the subsequent question session.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Format</th>
<th>Description and purpose</th>
<th>Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>Icebreaker</td>
<td>Groups of 8 with a facilitator and a volunteer research assistant</td>
<td>A reminiscence exercise conducted to establish rapport and equality of status within the group</td>
<td>n.a.</td>
</tr>
</tbody>
</table>
Storycircle | As above | Group member were given an equal opportunity to tell their own story of engagement with learning in their own words. This was followed by a question and answer session | Audio recordings and full transcripts of the storycircle and following discussion for CAQDAS analysis using NVIVO

Questionnaire | Individual | A questionnaire to capture personal information and information on engagement. Used to identify the need for further subjects | A description of the characteristics of the cohort of research subjects

Table 1 Data Capture activities

2.4 Data handling
Audio recordings of the ‘storycircle’ session were made and the session completely transcribed. Each individual narrative was filed separately using a pseudonym that identified the event at which it was captured and the facilitator of the group. The transcripts were handled using NVIVO software.

2.5 Analysis
The main criterion we had set in selecting individuals to take part in phase one was a long gap in their learning career. Gorard et al (1997) would have categorised these as ‘delayed learners’. In their study this term included those who had delayed a post-compulsory episode of learning by only a few years and also a small minority of what they termed “twilight” learners. These twilight learners were those who return to learning after a long gap following economic inactivity, either retirement or long term ill-health. Their report recorded that such learners had very similar age and qualification profiles to the non-learners. (Gorard & Rees, 2002:45, and Gorard et al 1997, p19, 20).

A first analysis of the narratives transcribed indicated that the majority of them fell into this twilight learner category and the decision was taken to focus the continuing enquiry on this category of learner only. In seeking to find improved ways of recruiting those disaffected with learning, the closer study of these twilight learners is appropriate. Many of the narratives described the sense of lack of accomplishment that these individuals had felt in their compulsory education:
I left coming up to school certificate and I didn’t do it, so I didn’t have any qualifications at all. When I got a job in the pit I could read and write basically.

Barry

But I’d failed the 11 plus. If you failed the 11 plus you went to a school from the dark ages. Secondary modern schools were disgraceful. They’re only training you to work in a colliery. Taught to read and write but that’s it.

Billy

I left school at fifteen with no qualifications whatsoever; I was the naughtiest girl in the school. I was always very naughty.

Kate

Turning non-learners into twilight learners, would bring benefits to the older people themselves and contribute to reduction of public spending on health, care, other social services and contribute to the economy of Wales, and to many of the policies and strategies of the Welsh Assembly Government (Spear, 2009).

The final analysis was carried out on the direct stimuli that were reported to have triggered a return to learning. This involved examining 54 narratives. The coding process produced 16 externally triggered categories which were then grouped into 5 broader themes; personal contact; local services; promotional activity; external events and learning for a purpose as described more fully below.

It was also noted that in some narratives the only reported return point was triggered by internal stimuli:

It was me. I thought they [the children] obviously need this so I am going to have to bite the bullet.

Karen

I got older and I thought if I don’t do it now I never will. I have no idea [what the trigger was] I really don’t plan ahead. My life has been a succession of detours and wrong turns because I don’t plan ahead.

Keith

So I sat in here one morning and I looked at it and went yeah. So I phoned my boss, ........ and 25 years had passed, they’d gone so quick ..........., so I phoned my boss and said I need to go to college.

Nigel

The patterns of how people return to learning after a gap are complex, underlying motivations are hard to deduce but many were similar to the above. They echo the many existing studies carried out on motivations to learn. However, those who are working to encourage individuals into learning opportunities can make a difference by offering practical assistance in stimulating that return. These suggestions are set out in the section on recommendations.
3. Findings

3.1 Overview

Our cohort of research subjects typified those individuals who, for a number of possible reasons, have not had a successful experience of compulsory schooling. Kris was just one who described how little was expected of him:

I left school in 1948 and in those days, in the school I went to, nobody expected you to achieve anything. It was a Secondary Modern school and I was the first of the fifteen year old leavers and I went to work in a grocery shop.

Kris

In general qualifications they have achieved have been gained later in life after a return to learning, and all now consider themselves successful learners whatever the level of their learning. As the following quotes demonstrate, they clearly valued the benefits they perceive of their engagement in learning.

My life has completely changed. My week is virtually taken up now

Klaus

I am a textile artist now I do painted embroidered pictures and I go to shows and sell my work, if I can, but I also enjoy passing my skills on to others so I’ve enjoyed learning and teaching others as well.

Nancy

But then slowly you build up your confidence and go on to the next stage and then the next stage

Natalie

......where I live, people go out to work in the cul-de-sac and you never see them again until they come home from work and it [the computer class] just takes you out…the knowledge of the computer also keeps me in touch with my friends, my two brothers. Can keep in touch with them and email them, keep in touch with friend in Spain. It’s opened up an avenue of not feeling so lonely and isolated.

Nellie
3.2 **Analysis**

As mentioned earlier, the analysis of the narratives of these learners has produced a pattern of direct stimuli based around 5 thematic groupings.

<table>
<thead>
<tr>
<th>Thematic groupings of stimuli</th>
<th>Constituent elements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal contact</td>
<td>With family, friends or a familiar professional</td>
</tr>
<tr>
<td>Contact with a local service</td>
<td>Services such as learning provider, libraries, community services, CAB</td>
</tr>
<tr>
<td>Promotional activity</td>
<td>Direct personal approach, advertisements, open days/learning festivals, newspaper coverage</td>
</tr>
<tr>
<td>External events</td>
<td>e.g. redundancy, bereavement</td>
</tr>
<tr>
<td>For a specific purpose</td>
<td>A motivational purpose or to gain specific skill or knowledge</td>
</tr>
</tbody>
</table>

**Table 2 Stimuli for engagement thematically grouped**

3.2.1 **Personal Contact**

The most significant stimulus to engagement at the point of return to learning evidenced in this study is the notion of ‘personal contact’. Participants told us, time and again, that family members, friends and professionals had a major impact on their decision to undertake a course of study. Narratives of family members spurring a return to learning were common, with examples of them offering encouragement in some instances, and challenge in others. Friends were more often seen as encouraging and also offered practical help and support. Frequently it was personal contact with individuals who were in professional relationships with the learners which was cited as the trigger to return to learning. These were sometimes work colleagues, or managers whose role might be considered to include encouraging development. However, sometimes they were quite unexpected sources of motivation.
Family contacts:

Barry, was approaching retirement:

I was talking with my nephew who was Associate Dean at Bolton University and was well qualified to give information about education. He asked me what I was going to do when I retire. I thought “Nothing!”. A bit silly really. He said, “Why don’t you do an access course?” I said “Ok!” Anyway, to cut a long story short, I applied to Pontypool College

Barry

This started him on a learning career that has included a higher degree, IT and new media course. For Norman, it was an unexpected gift from his son:

I was sat there one morning, minding my own business, when my son turned up. He said, ‘Dad, I got a present for you … A computer’. I asked, ‘are you kidding’? ‘No’ he said, ‘a computer’. He came in and we had it propped up in two chairs. That’s how this whole (learning) thing started … (Soon after, a friend) told me there’s a computer class in Nelson library. I wandered in and they told me that it started in the September but that I could put my name down. This was July/August time. Next thing I knew, I got a call from Susan (course teacher) and thought, what the hell have I done!

Norman

It is notable how many returns to learning start with computer lessons as was true for Non.

Then my son said to me, “Why don’t you go to computer lessons?” and I said, “Don’t be silly, I can’t do things like that, I can’t write my name properly without spelling it wrong half the time, without having to do that” He said, “You can do it, it’s more buttons than anything else.”

Non

There were examples of family members providing a direct challenge that triggered an intent to learn:

.......he said “You can’t call yourself Welsh anyway because you don’t speak the Welsh language”. You know, this business about identification with language and culture. So we came back home and I thought. Right this is one thing I’m going to do

Nora

or the indirect one for Norman of seeing a very young grandchild being able to do something provoking a realisation that he too was quite capable of learning:

He [my son] put the camera down, gave it to her [granddaughter], and there she was sat there, a 3 year old, pressing the buttons, getting the pictures up on the screen at the back of the camera. I thought, Norman, you’re an idiot.

Norman
Friends’ influence

Layla’s thought of returning to learning were stimulated first by a suggestion from a friend and then refined by a conversation with another.

I have a friend who is a barber and she was needing cover in her shop, apparently, there is a real shortage of barbers. So I found out that you could go once a week to night school to train and I thought I can cope with that, I can still work, but another hairdresser friend talked me into looking at being a hairdresser rather than just a barber because it would keep my options open. Layla

and Noreen describes quite clearly how she would not have been able to attend had she not had her friends’ help:

Well I had a group of friends and I was told that someone would come and pick me up. By this time I had a folding wheelchair. They would come they would pick me up in my wheelchair and they would physically take me there. Nora

Whilst one might have expected to find a head teacher encouraging a return to learning it may seem more surprising and encouraging that the person he was encouraging was a dinner lady.

The first time I was encouraged by the head teacher at my son’s comprehensive school to come and do A-level French. Nicola

In the following example a work colleague who had no responsibility for personal development inspired a workmate with stories of his own learning experiences.

Then in 1989 I started working in a pot noodle factory, and I stayed there for a number of years. One day, just by chance, working on a production line, with Glyn his name was, working opposite him, he’d just done a trade union course at Ruskin College. Was talking to him about his course, thought this was interesting. In particular, one of the areas he did was sociology. I’d never heard of sociology, but I found what he was saying interesting so I enrolled at Ystrad Mynach College, O-level in sociology. Norris

3.2.2. Local Provision

Locality and community provide a fulcrum for engagement with learning. The local library was cited in several instances as both a site of learning activity and a source of information on local provision. Other services not directly linked to learning services also attracted new learners and put on learning activity. Coming across learning opportunities in the local community, sometimes almost by accident, provided a spur to take up learning:
They were on computers and this lady was going round and obviously she was teaching them. I happened to go to the library to read the papers to see what jobs there were and I saw her and I just asked the question, what was she doing. She said, ‘I teach this class’, and I said “Do you take people on?” She said “Yes” and said she would ring me which she did. If I hadn’t have been there on that day, I wouldn’t have seen it. It just happened to be a Wednesday.

Kelly

Some of the colleges do Welsh classes but we saw one advertised in the local paper and then again in the library with a group called Popeth Cymraeg. So we thought let's go along and find out what this is like. Ken

I was invited to the Citizen's Advice Bureau when they opened an internet cafe. So we went along and we carried on going and then the lady who runs it said about doing a computer course. Kara

In rural areas significant travel can be involved and one learner was very pleased to find a suitable class nearby.

And it was local, this is very important because all the other pottery classes were some thirty miles away and this was just six miles away. So I decided I would go to these pottery classes and these drawing sessions. Chris

Familiarity with the local provision seemed to provide confidence to take the returning step to learning.

I always knew this college was around, being local and having been here before, and I came in and asked to go to advice and guidance Lance

And one day when I went to the library, one of the people in the library said to me, why don’t you join the computer class? It'll get you out and get you back in an environment. Nellie

They were running one locally, in a community centre or a council hall there. I went along, the kit wasn’t particularly brilliant but it was at the level that I could cope with. Norman

The fact that learning activities were provided locally had importance beyond being practical and convenient. By being visible within the locality, the provision itself acted as a means of attracting learners.

3.2.3 Promotional activity
Promotional activity carried out deliberately to attract people into learning also acts a successful spur, especially it seems, if it is linked to the two earlier factors
local provision and personal contact. There were 4 approaches that were apparent within promotional activity: Advertisements; personal approaches; open days or learning festivals and newspaper stories.

Advertisements of various sorts were mentioned. Most prominent were adverts in the local press but also posters and leaflets seen in a variety of community settings. Commonly informants reported these and connected them with a conversation which prompted action:

I saw the posters that were advertising the courses, but I didn’t feel that I wanted to go and then one of the teachers suggested it. Clare

I seen an advertisement in a leaflet in the library so I rung it up and it was Jenny. Me and my sister was going to do it. We went down to see her [Jenny] and she suggested doing the literacy and the numeracy. Natalie

There were some very direct personal approaches:

A lovely young man knocked on the door, from Machynlleth, is that how you say it? And offered a taster course in our local hall. 5 mornings, 2 hours. See if you like it, come along. Ok Beth

and mention of Open days or Learning Festivals were also linked to the opportunity to discuss:

So when I was at the Green Festival at Aberaeron, there was a young lady there who was playing with a piece of clay, she was a potter, so I stopped to talk to her. She told me about classes. Chris

Came in on an Open day and got roped in to a degree signed on the dotted line like. Ken

Newspaper stories also featured as a stimulus:

I saw this thing in the paper not an advert it was about a pile of people who had just finished a course. Lee
3.2.4 External Events
External events played a major part in stimulating a small number of learners. Despite the events being well outside of the control of the learner, they had a significant impact on these individuals. These events included redundancies, a strike, major illness and bereavement.

3.2.5 Learning for a purpose
The final theme was learning to achieve a particular purpose. Frequently, these reasons were connected with digital technology, learning skills that that individuals had not previously had the opportunity to gain. ‘Computer skills’ is commonly recorded as the most popular subject for adult learning at all ages, followed by foreign languages (Aldridge & Tuckett, 2007:34). Perhaps unsurprisingly therefore, a high proportion of the learners taking part in the study were learning about digital technology of some sort. These frequently learned other subjects as well. It is not clear from the narratives whether ICT is such a popular choice on returning to learning because of demand or supply factors:

Anyway, it wasn’t until a few years ago, my boy’s in the army and he started going to Iraq and Afghanistan, and he was never getting our letters. “No I haven’t had them” and all calls were virtually impossible, so he said “Well why don’t you email?”

Neil

My daughter had some photographs taken up in London, and we wanted a copy of them. There was a bridge playing friend of ours who was a professional photographer and he said I can copy them for you, come up one day. So we went along to his home and he had his computer, printer, scanner there, and he just ran this copy off. I’d had very little to do with computers at that time, certainly PCs. I understood a little about industrial computerisation and windows but I’d never done much with computers at all. I looked at the ease at which he did this, he just ran off a copy of this photo and it was perfect. I looked at it and thought well I can do that, surely. And that started me off on learning in a way

Norman

Surveys report that foreign languages are popular with older learners and in our survey there is evidence of the purposefulness of taking up these studies.

My nieces had both qualified and moved to Madrid, independently, to live and work in Madrid. They said you have to come and see us. So I thought, not until I know some language, because I think it would be discourteous to go to a country and not know any of the language.

Nicola

My boy said you and mum want to go to Spain, why don’t you go to evening class to learn Spanish? So I went to evening class to learn Spanish.

Billy
3.3 Other findings

In phase one of the study in addition to the narratives about the point of return to learning, research data was also collected on the factors that supported learners to be successful in their study.

Themes mentioned were:

- the support of family, friends and colleagues;
- the support of tutors and other staff employed by learning providers;
- the availability of appropriate information;
- support for and recognition of learner development;
- the convenience of learning opportunities; and
- help with meeting the costs of learning.

Learners also had many practical suggestions for supporting new learners. Where they link closely with recruitment practice, and particularly where they offer ideas not encountered in other studies, this information will be drawn in to the recommendations below.
4. Understanding

Our findings confirm the importance of key people in encouraging engagement from previous studies. McGivney (1999:26,27) identifies:

- Specialist guidance or education outreach workers;
- Other workers in the community not necessarily working within education e.g. health visitors, and community workers; and
- Animateurs and role models from the community.

These act as facilitators of engagement, and McGivney proposes training for such individuals. These proposals have been taken up in Wales, for example the RISE\textsuperscript{10} learning advocates scheme and the Workers Education Association Community Learning Representatives\textsuperscript{11} schemes.

This study has shown that family and friends and those members of the community, who may not normally consider themselves as “positive role models”, or to play any other recognised part in personal or community development, can also be important in engaging learners. Finding ways to encourage this route in to learning may prove effective, if difficult, in increasing participation particularly amongst older learners who have a similar profile to those in the study. Is it possible that the very informality and lack of structure of the interactions is the hallmark of their success? If so how can we conceptualise the interactions so that we can seek to replicate them or their effects?

4.1 Identities and Learner Identities

Processing a number of the transcripts led to consideration of the importance of identity and specifically learner identity within the process of successful engagement with learning after many years.

The task of bringing social theory together with psychological understanding of the individual, so that identity formation can be understood in a multifaceted and multidisciplinary fashion, has been a topic of discourse amongst sociologists and

\textsuperscript{10} RISE- University of Newport see \url{http://www.learnwithrise.com/english/default.htm}
\textsuperscript{11} For details of WEA south Wales CLR projects see \url{http://www.swales.wea.org.uk/clr/}
psychologists from the late 1960s to the current time\textsuperscript{12}. Quoted by many is Giddens (1991) for whom:

...identity in late modernity is understood to be a ‘reflexive project of the self’, which involves the individual in developing their self-narrative within a context of ever-shifting social experiences and interactions with social institutions. (Wojecki, 2007:172 original quotation marks)

Through a changing context of social, geographical, emotional and cultural experience, identity can be thought of as constantly under construction even in late adulthood.

The concept of learner identity to describe an individual’s perception of themselves in relation to learning has also been used. In a study on learner identities in the workplace Wojecki (2007:174) describes an operational model (based on Sfard and Prusak, 2005) which links actual identities with designated identities. Actual identity is based on experiences up to the present and designated identity shapes the contemplation of the future. Wojecki suggests that for an individual with traumatic or negative experiences these can become part of the story of their learning history and affect their designated identity and therefore their preparedness to take up new learning experiences. In this study people readily related the narratives of their early experiences\textsuperscript{13}:

I remember when I was in school; I was stupid in school, in the X class!

I don’t come from a background where there was much art and even culture if you like and it feels as you are trying to be something you're not.

Learning for me has always been very difficult. If I was in school now, I think they’d say I have very bad dyslexia. I found school very, very difficult. I came out of school and went in a job that I didn’t have to write anything .....  

Although all those learners in our study were by now successful learners, there is clear evidence of how those early experiences could limit their ability to envision a future identity of successful learning, even for those who had some confidence:

There was a big question mark in my mind, can I do it. Even though I thought at the time, yes I could, but after a number of years being out of education, you think can I do it?

\textsuperscript{12} See for example Blackman & Walkerdine (2001) and Hall (1990) amongst a wide range of writers

\textsuperscript{13} The examples are drawn from our study
It is easy to conceptualise the strengthening of identity as a learner once participation has begun. In our study we heard:

I was doing my degree, after I passed my first exam and did my first assignments, I can remember that feeling of thinking *I'm not thick* because I always thought I was and I'd accepted the fact that I was. Camilla

The more I did it, the more I wanted to carry on. Natalie

However this does not explain how or why at the point of return to learning they were prepared to embark on this new and presumably daunting, experience. Wojcicki (2007) describes his understanding of the evolving learner identity, constantly under construction, as learners tell and re-tell the stories of their learning experiences according to their audience and the context. In his work with trainees in the workplace, he actively shaped his pedagogy to support the development of learner identities within the workplace by shaping the stories they were able to tell and the different contexts in which they were able to tell them. The importance of personal interactions found in our study can be seen as providing the opportunity for individuals to tell their learning stories to the right listeners in the right environment to develop a more aspirational designated identity.

In the reported conversations that triggered engagement there was evidence of exchanges that follow this pattern. For example Non’s narrative starts with:

Learning for me has always been very difficult. If I was in school now, I think they’d say I have very bad dyslexia. I found school very, very difficult. I came out of school and went in a job that I didn’t have to write anything – I did hairdressing.

Later she described an exchange with her son.

Then my son said to me,

“Why don’t you go to computer lessons?”

and I said,

“Don’t be silly, I can’t do things like that, I can’t write my name properly without spelling it wrong half the time, without having to do that.”

He said,
“You can do it, it’s more buttons than anything else”.

So I thought about it, I thought, well this computer is at home, and I should be able to do something else besides, if I can see somebody across the other side of the world, [of using Skype to speak relatives in New Zealand] then I can do something else.

Later again her storytelling is much more reflective:-

And I found that the computer does help me to spell as well. I’ve really and thoroughly enjoyed going back and I just wish I was 16, that I could do it all over again.

Not surprisingly conversations with professionals are reported as encouraging. Particularly favoured was a non-directive approach, but one that encourage changes in self perception:

But they talk to you, advice and guidance, give you some good advice they do talk you round they see the potential in you.

They said “No you’ve got to do something more, you’ve got potential”, so they fixed me up with the careers advisor and it ended up I went to Caerleon college to do teaching. In a nutshell!

4.2 Developing Practice

Building on understanding gained from this project and previous studies on motivating adult learners, three main areas can be identified as important in seeking to engage older people into learning:

- Work with learning providers and education outreach workers;
- Work with other professionals who may be in contact with older people;
  and
- Consideration of the interactions within families and between friends.

This study has illustrated the importance of understanding the concept of learner identity, recognising that past poor learning experiences can create learner identities that act as a barrier to engagement, but that it is possible to create conversations and contexts in which a more positive learner identity can develop. For those who have an identified role in seeking to encourage older people into learning there is scope to reinforce current good practice and develop new ideas. Whether those concerned are professionals or volunteers working in the field they can be provided with training courses or materials that will assist their practice.
Groups of older people around Wales could also provide sites for discussion and positive learner identity development, especially if there are staff or volunteers aware of the importance of the role of learning and with a willingness to take on a promotional role. They could be offered training and materials in a similar way to learning professionals.

The interactions within families and between friends are much less susceptible to influence. However, the development of practice that creates spaces within which these interactions can occur can and should be encouraged. Learner stories that demonstrate the important influence of family on engagement can be promoted in much the same way as other successful learner stories, opening up the opportunity for family discussions.

The barriers that adults face in accessing learning opportunities are frequently (NIACE 2006) categorised as:

- Situational – time; place; money;
- Structural – insufficient information and knowledge; postcode lottery; institutional barriers; lack of work-based training; and
- Dispositional and cultural – previous learning experiences; personal factors.

Older people potentially face all of these. However, it is perhaps those dispositional barriers that provide the first hurdle to be overcome in engaging with learning after many years. Those with lower stocks of identity capital and with learner identities that are associated with lack of success, or unpleasant experiences, are less likely to be involved in the learning activities that will help them build that capital and a successful learner identity: a classic Catch 22 situation. Conversations with others are required to support change in individuals. The recommendations made seek to stimulate such interactions.
5. Conclusions

As described above the benefits of broad participation in adult learning are clear, for the adults involved, and for the wider social and economic well-being of Wales. Engagement in learning plays a role in maintaining physical and mental health, avoiding social exclusion and maintaining the skills and capabilities required to address the changing challenges of life. These benefits are very important in encouraging active ageing and maintaining independence in later life, however, the rate of participation in learning falls with age. Increasing participation rates for older people could play a significant part in mitigating some of the potential difficulties of an ageing population\textsuperscript{14}.

This study has emphasised the importance of learner identity associated with negative experiences as a potential barrier to engagement. Readers should take account of the fact that people in their mid fifties and older were in school at a time when the school leaving age was below 16 and many left school before having the opportunity to take examinations\textsuperscript{15}. For such individuals the development of a positive learner identity may be more difficult and many have not taken part in learning since school.

This study has sought to improve understanding of the processes that lead to successful engaging older learners. The most striking characteristic of the narratives of the individuals who took part in the study and who have successfully returned to learning after many years is the significance of discussing opportunities with someone prior to returning to learning. This could be a family member, a friend or familiar professional within a familiar local environment. The discussion was then a prompt to taking action to seek out an opportunity.

Individuals taking part in the study also mentioned many of the accepted methods of local promotion of activity: leaflets, posters, local newspaper advertisements, open days (as previously described) and had in many instances responded to those.

The following recommendations, based on the evidence on this study, aim to increase the number of older people learning, and particularly those who may not have done any learning for a considerable time. It should be noted however, that none of the learners in the research came from a residential care setting or were restricted to their own homes by mobility or health problems. There is a need to

\textsuperscript{14} Here older is 50+

\textsuperscript{15} The school leaving age was raised to 16 in 1972
be mindful of the need to offer such older people learning opportunities too, and the recommendations made are insufficient to ensure their participation.

5.1 **Recommendations**

1. Professionals working with older people should be made aware of the benefits of learning to older people and of the role they can play in facilitating engagement in learning.

2. Support should be given to schemes that encourage community members and other learners to play a voluntary part in recruiting and supporting new learners. Schemes such as the Rise Learning Advocates, WEA Community Learning Reps and the Wales Adult Learners Network could be highly influential and effective in engaging new older learners.

3. Support should be maintained for local activity that promotes local learning, particularly those promotional activities that allow opportunities for informal discussion e.g. learning festivals and open days.

4. The potential role for family and friends in encouraging older people to return to learning should be made clear to those promoting learning and to a wider audience.

   This could be achieved through:

   o Including appropriate narratives of influence within the stories of successful learners used within the current promotional campaigns

   o Using appropriate stories in a targeted way

   o Creating a specific campaign such as “bring a friend/family member to learn day”.

5. A particular focus on intergenerational approaches to recruiting new older learners should be developed for use within the context of Community Focused Schools.

6. Training or guidance materials on encouraging older learners and based on this study should be made available to support other recommendations.

NIACE Dysgu Cymru will be implementing some of the recommendations above within its role of promoting adult learning in Wales. Further support in the full implementation of the recommendations will be welcomed.
Bibliography


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NIACE (annual) details of Adult Learning Participation Surveys from past years can be found @ [http://www.niace.org.uk/niace-adult-participation-in-learning-surveys](http://www.niace.org.uk/niace-adult-participation-in-learning-surveys)


