

Adult learning

and Australia's ageing population

A Policy Briefing Paper

John McIntyre

Adult Learning Australia Inc



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Adult Learning Australia Inc.
Level 1, 32 Northbourne Avenue, Canberra
PO Box 260, Canberra City, 2601, ACT
Tel: (02) 6274 9500 Fax: (02) 6724 9513
Email: info@ala.asn.au
Web: www.ala.asn.au

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Executive summary

The ageing of the Australian population has become an important policy focus for the Federal Government. It has outlined measures to address the impacts of demographic change with the objective of retaining older people in the workforce.

As the Federal Government's discussion paper *Adult Learning in Australia* made clear, this has thrown the spotlight on the learning of older adults, particularly for those who have missed out on learning earlier in life.

This will mean rethinking our attitudes to the learning of older people and our preoccupation with formal education and training for youth, not to speak of a wholesale shift in historical attitudes to work and leisure in later life.

Adult Learning Australia (ALA) has commissioned this policy briefing paper to consider what is needed to realise the vision of older Australians engaging more fully in learning and work. In summary, we conclude–

- First, that *national policy leadership* is needed to give coherence to efforts to promote learning by older people. Any framework needs to be cross-sectoral and holistic and concentrate on learners and contexts rather than institutions and sectors. It will need to address the very uneven commitment by the States and Territories to existing goals to promote lifelong learning.
- Second, *an ecological perspective on adult learning* is needed, emphasising strategies to facilitate learning in workplaces and communities. This will require thinking beyond the institutional square to embrace concepts of 'workforce development' and 'skill eco-systems'.
- Third, adult learning needs to be *understood in relation to broad social policy*. We need to appreciate how different groups perceive the risks and benefits of participation in learning in later life, and consider how social policy can mitigate the 'riskiness' of life-course transitions.
- Fourth, *the 'learning community' is a key focus*. We endorse the Federal Government's emphasis on partnerships of educational providers, community agencies, local government and employers. We suggest that many adult and community education (ACE) organisations have the capability to lead community-based learning initiatives.

The need for national policy leadership was widely expressed in national consultations following *Adult Learning in Australia* and in Peter Kearns' recent work for ALA. *Adult Learning in Australia* emerged during the wider debate on Australia's ageing population. It rightly laid emphasis on mature age transitions, the 'learning community model', the role of employers in improving older workers' access to learning in the workplace

national policy leadership is needed to give coherence to efforts to promote learning by older people

We need to comprehend the way different social groups perceive the risks and benefits of participation in learning later in life

the concept of the 'learning community' is a key focus for a national policy that is consistent with an ecological and cross-sectoral approach

We do not lack knowledge of the barriers older learners face or the measures that will assist their participation. We lack a framework for action that is nationally agreed and resourced.

and the needs of rural and regional areas.

The primary policy response to Australia's ageing demographic is to retain older people in the workforce through measures to improve health and education, disincentives to retire and workplace flexibility. This brings into question the adequacy of support for the learning of older workers—the OECD has recommended that Australia should strengthen measures to assist low-skilled older workers by broadening the range of training possibilities.

Employers can manage the impact of the ageing workforce through a range of strategies to retain older staff and their expertise, especially where work is increasingly based on knowledge-creation. To retain valued workers, organisations need to consider how work can be organised to promote learning as part of work. However, high-skill workers in the 'knowledge-economy' have greater access to employer-provided training and informal workplace learning.

Low-skilled and low-paid workers, those most at risk of redundancy, have had fewest opportunities to acquire new skills and develop a positive orientation to learning. Low-skilled older workers have less 'pay-off' in increased wages from gaining additional low-level qualifications especially where age discrimination acts as a barrier to employment. Hence, a national policy on adult learning needs to focus on those older people with fewer educational and occupational resources to support their participation in lifelong learning.

Broader social policy affects the incentives to older people's attitudes to participation in work and learning. *Adult Learning in Australia* rightly emphasised life-course transitions. Currently there is interest in European approaches to managing the 'social risks' of transitions. Social policy can attempt to prevent or mitigate the perceived social risks of participating in learning and working later in life—which are greatest for people with low skill levels who often do not receive training at work. This means designing opportunities that address the riskiness of learning for those who do not participate, including flexible approaches to learning in the workplace.

To widen participation, adult learning needs to be understood in a more 'ecological' way—one that emphasises the contexts of learning as much as formal courses and qualifications. Consistent with this approach are emerging concepts such as 'workforce development' and 'skill eco-systems'. This strategic policy focus can embrace both workforce and community contexts, and requires educational providers to work with other agencies in collaborative ways.

The concept of the 'learning community' is a key focus for a national policy that is consistent with an ecological and cross-sectoral approach. Many adult community education (ACE) organisations have developed a good capability in working with older clientele. They are well-placed to take a leading role in catalysing learning within communities, in partnership with local government, employers, TAFE institutes and other agencies.

We do not lack knowledge of the barriers older learners face or the measures that will assist their participation. We lack a framework for action that is nationally agreed and implemented with commitment.

The policy challenge

In recent years, the Federal Government has made the ageing of the Australian population an important policy focus and outlined measures to address the impacts of demographic change.

As *Australia's Demographic Challenges* recently proposed, the Commonwealth's goal is to increase older people's participation in the workforce, achieved through better education and health, reduced incentives to retire and greater workplace flexibility.

This has thrown the spotlight on the learning of older adults. Goals for active and productive ageing envisage a greater participation by older people in adult learning¹ across the board. It is obvious that this will mean rethinking our attitudes to the learning of older people and our preoccupation with formal education and training for youth, not to speak of a wholesale shift in historical attitudes to work and leisure in later life.

Adult Learning Australia (ALA) has commissioned this briefing paper to consider the implications of the ageing of the population for a national policy on adult learning. The paper reviews the background to ageing policy. It examines what is being recommended for employment practices and learning at work, and considers the broad context of social policy that has much to say about 'life-transitions' that are motivating the learning of adults. It then considers directions for national policy that emphasise community and workplace as arenas of action on adult learning.

The paper considers what is needed to realise the vision of older Australians engaging in learning as they participate more fully in learning and work.

First, it argues that *a national policy is needed* to give coherence to efforts to promote learning by older people. Any framework needs to be cross-sectoral, holistic and 'ecological' and concentrate on learners and contexts rather than institutions and sectors. There is a clear need for *national policy leadership* to bring about goals for promoting adult learning to which the States and Territories subscribe.

Current policies in the different jurisdictions present a fragmented and far from coherent picture. There is a very uneven commitment by the States and Territories to the Ministerial Declaration on ACE and its key goals such as strengthening 'innovative community based learning models'—despite the fact that learning in the community is acknowledged as a key strategy for reaching socially excluded learners.

National consultations by DEST and ALA have revealed there is a broad consensus that weak policy now constitutes a principal barrier to wider opportunities for older people's learning.² We do not lack knowledge of the barriers older learners face or the measures that will assist their participation. We lack a framework for action that is nationally agreed.



There is a clear need for *national policy leadership* to bring about goals for promoting adult learning to which the States and Territories subscribe.



Workplaces are a key arena for promoting the learning of older workers

Second, we need to *take a more ecological perspective on adult learning*, to consider how it can be facilitated and supported in workplaces and communities. The emerging priority for adult learning is still clouded by the fixation of education and training policy on systems and sectors. A national policy needs to focus on context and avoid identifying 'adult learning' with any particular sector or type of provider, notwithstanding the important role that adult community education (ACE) agencies must continue to play in promoting adult learning. The consultation paper *Adult Learning in Australia* rightly pointed out that promoting learning by older adults will require thinking beyond the institutional square.

Workplaces are a key arena for promoting the learning of older workers. A good deal of attention is being paid to how employers can retain older people in productive work and how workplaces need to change to encourage learning as part of work, particularly for low-skilled workers. Government is emphasising increased workplace flexibility as a factor increasing older people's participation in work—though the evidence is that major efforts are needed to address age-discrimination in employment practices and assist older workers to acquire new vocational and life skills.

What 'adult learning' means for older workers is being reconsidered in terms of broader concepts of 'workforce development strategy', requiring a rethinking of the role of vocational education and training (VET) systems and their relationship to labour markets. Skills formation is now being understood through more holistic concepts such as 'skill eco-systems' that envisage a web of industry, workforce, socio-cultural and regional factors. These trends reinforce the need to frame national policy on adult learning in contextual, cross-sectoral and ecological ways.

Third, adult learning needs to be *understood in relation to broad social policy*. Ageing policy draws attention to retirement from full-time work as a life-transition. Current European thinking emphasises the increased complexity and 'riskiness' of transitions in and out of labour markets over the life-course. Social policy can mitigate the difficulties of transitions by appropriate incentives to support participation in education and training while taking into account the 'policy web' of health, welfare reform, taxation, retirement and income support issues that influence perceptions about the value of learning. National policy on adult learning will need to comprehend the way different social groups perceive the risks and benefits of participation in later life.

The ageing 'baby-boomer' demographic is very diverse and far from equal in its access to adult learning—participation differs greatly according to educational and occupational background. Highly qualified older people in better jobs have access to learning at work and fare better in making labour market transitions, whereas low-skilled older workers who have borne the brunt of industrial restructuring are often excluded from the 'knowledge-economy' and its learning opportunities. National policy needs to consider how it can support the participation of those groups who have missed out on learning.

Fourth, the paper argues that *learning in community contexts is crucial*. It

concludes that the way forward is to promote the development of strategies such as those advocated by the ‘learning community’ movement. Understood in broad cross-sectoral and ecological terms, these should be seen as complementing workforce development strategies. A national policy on adult learning could, by funding a national program of learning community initiatives, stimulate collaborative and cross-sectoral developments—providing incentives for partnerships of educational providers, community agencies, local government and employers, as envisaged in the Adult Learning in Australia discussion paper.

National policy needs to promote a diversity of developments and to avoid the pitfalls of vesting ‘adult learning’ in any one sector or type of provision. However, a key objective of national policy should be to strengthen the capability of adult and community education organisations, since they are well placed to lead community-based learning initiatives. Many ACE organisations have developed a multi-service capability, often as a result of expanding into Federally-funded VET and employment services. They usually have a history of working with older clienteles, particularly women returning to work, and are expert in developing the confidence, skills and motivation to learn that is necessary to increased social and economic participation.

There needs to be more debate on the role that ACE organisations can play in any national strategy that seeks to work with the learning communities movement, and what kind of incentives are needed to break down sectoral barriers and forge community learning partnerships. In the spirit of a holistic policy for adult learning, this debate should not treat ‘learning community’ initiatives in isolation from workforce development strategies or maintain the fruitless distinctions between learning for life and learning for work that have plagued policy for decades.

In pursuing these directions for a national policy on adult learning, the paper examines recent discussions of the ageing population—

- how ageing policy has drawn attention to adult learning
- policy responses to the ageing population
- what will be required by employers and workplaces
- current social policy thinking about transitions and social risks
- developing a broader concept of adult learning
- learning communities and the role of ACE organisations.

A national policy on adult learning could, by funding a national program of learning community initiatives, stimulate collaborative and cross-sectoral developments



Adult learning in the context of ageing policy

The broad sweep of a national policy on ageing is important to those working in the field of adult learning because it touches on 'positive and healthy ageing, work and later life planning and health and care' (National Strategy). It has implications for current debates about lifelong learning as a policy framework in contemporary society.³

The Federal Government released a discussion paper *Australia's Demographic Challenges* in February 2004 following the Treasurer's Intergenerational Report and studies by the Productivity Commission of the economic implications of the ageing population.

Earlier the government had launched the *National Strategy for an Ageing Australia*, whose background paper identified many issues surrounding mature-age workers (Office of Ageing, 1999).

The consultation paper *Adult Learning In Australia* (DEST 2003) appeared some months after the Intergenerational Report with the aim of seeking 'views on the role adult learning has in addressing the challenges presented by Australia's ageing population' and 'the particular challenges for adults learning in rural and regional Australia'.

It put forward 'seven key areas' for consideration: understanding the needs of adult learners; building relationships between service providers, employers, government and the community; promoting the value of adult learning' assisting mature age transitions; supporting learning in the workplace; ensuring access to opportunities; and engaging communities.

The paper signalled that older workers ought to become a focus of informal workplace and regional community learning initiatives. It drew attention to various trends—

- Those in the most skilled occupations (with lower levels of schooling or qualification) are least likely to have participated in learning in the last year.
- Some older workers most at risk of redundancy are found in regional communities heavily impacted upon by industrial change
- Older people are particularly assisted by the informality and flexibility of ACE programs to overcome psychological barriers such as anxiety that are typical of less skilled older people⁴.
- The respective roles of government, the community and business in promoting adult learning, and the need for co-operation among these partners.
- Highlighting the central role the ACE sector plays in communities in terms of the Ministerial Declaration on Adult Community Education (2002).

The paper signalled the importance of greater ‘integration’ of opportunities and the need to promote adult learning as a response to population ageing. Importantly, it highlighted the concept of ‘mature age transitions’ and it projected the ‘learning community model’ as one way of promoting greater participation in learning in rural and regional Australia. It raised the problem of older workers’ access to learning in the workplace and the key role that employers can play.

The national consultation process identified five key issues, foremost of which was the development of a national policy on adult learning to ensure ‘a genuine commitment of government’ at all levels to improving opportunities for adult learners. There was a need for government to broaden the concept of learning beyond formal education and create greater public awareness of the value of informal and community-based learning. Finally, a national policy was needed to overcome the fragmentation of opportunities and inequality of access and resources experienced by regional communities.⁵

What then does *Adult Learning in Australia* portend for the future initiatives of the Australian Government in the area of adult learning? How will it change the fundamental problems that stand in the way of building greater capability of communities to respond to the needs of those older learners who do not participate?

How will it help to address the lack of resources for community agencies that enable much of the ‘informal learning’ that is most effective with older adults returning to learning, or the fragmentation of adult learning opportunities? Will it remedy the lack of an advisory system to facilitate linkages between learners, employers, training providers and governments?

Adult Learning in Australia suggests that developments in national policy are likely to come through strategies that target clienteles of older workers through community-based programs and workplace initiatives. In political terms, ‘lifelong learning’ is not a commitment to be funded but a political rhetoric useful in mobilising people to participate both in education and training and in learning at work. This means that the argument for a coherent ‘lifelong learning’ policy must be couched in terms of specific policy agendas such as the ageing of the population.

Ageing policy has set its sights on older workers especially those less skilled workers involuntarily retired through redundancy and those who have opted out of the labour market. The educational component of this policy meshes with other political agendas for change to industrial relations law, retirement and superannuation policies, welfare-to-work reform and the role of employment services and changed Federal-State arrangements for the direction and funding of vocational education and training.

For this reason, a later section of the paper will review how ‘adult learning’ is being cast in new social policy moulds. However, it is first necessary to review the policy interest in the ageing of the population.

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Ageing policy: the background

Ageing policy became subject to economic analysis with the Treasurer's Intergenerational Report released with the Budget in May 2002. This followed the earlier National Strategy for an Ageing Australia in 2001. The report outlined the likely consequences of a changing age structure lowering participation in the workforce and slowing economic growth. Subsequently the Productivity Commission reported in detail on the implications of the ageing population on economic productivity, labour supply and budget impacts.

The Commission framed the impacts of the ageing population in terms of the 3Ps of economic growth—population, participation and productivity. It projected a rising proportion of people over 65 in coming decades, and relatively fewer young people, reflecting the high fertility rate of the post-war 'baby boom' and the subsequent decline of fertility ever since, coupled with increased longevity. Increased migration would have only a modest and short-lived effect on the problem. It saw the positive side of ageing as the economic gains made possible by large numbers of baby-boomers in productive work.

The Commission examined the effects of the ageing population on labour force and productivity, concluding that it will further lower Australia's relatively low participation by over 55s in the workforce—and this will not be much offset by increased youth participation or older female participation. Without intervention of the kind proposed, the trend will be for older males in low skill occupations to leave work earlier (currently contributing to high take-up of the disability pension). The tertiary qualified tend to stay in the workforce for longer. A future 'sluggish labour supply' will not be corrected by the take-up of unemployed and marginally employed, since skill, motivation and aptitude come into play.

Though ageing may have a small negative effect on productivity, this is not certain, since productivity gains may continue to offset losses due to ageing, especially if tomorrow's workforce is healthier and better educated.

Tax revenues as a proportion of GDP will barely rise as a result of large numbers of older workers leaving the workforce, in the absence of incentives to stay on. At the same time, expenditure will tend to increase particularly on health, aged care and age pension. On balance, it does not seem that the 'older but healthier' effect will mitigate increased costs—since better interventions for old people prolong life and raise costs (through community expectations for access to improved medical technologies and expensive drugs). Aged care costs will not be much reduced by informal caring since there will be fewer younger carers.

This kind of analysis has not gone unchallenged by economists who question the fundamental assumptions about taxation and government

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spending on which it rests.⁶ They were, however, the background for framing the policy options to address the effects of ageing set out in Australia's Demographic Challenges (Treasury, February 2004). This recommended that policy should aim for higher productivity through increased workforce participation, achieved by—

- improvements in the capacity for work, through better health and education
- better incentives for work, through changes to income support and reduced incentives to retire early
- improved flexibility in the workplace, by reducing 'the amount of regulation imposed on those seeking to negotiate mutually beneficial wages and conditions'.

'Better education' refers first to the government's agenda to improve formal school outcomes such as literacy levels, though this is usually claimed to have only marginal impact on productivity to offset the loss of skills of older workers. The real problem is not older workers in general but the disparity between high skilled participating in the 'knowledge-economy' and low-skilled who are most at risk of redundancy and who receive least training support on the job and who are most likely to leave the workforce after 55 through involuntary retirement.

The focus of educational measures needs to be participation in both employment and educational services geared to learners' needs, though the report is vague about what needs to be done to 'apply remedial efforts to improve the participation rates of the current group of adult workers, particularly the low skilled and mature-aged'. It projects 'policies designed to better target and match in a more timely way the skills needs of industry to those of job seekers through improved links between industry, registered training organisations, the broader vocational education and training system and employment services such as Job Network members'.

The nub of the problem—getting older, low skilled workers to stay at work or increase their participation in paid work or improve their capacity to work—is understood in terms of a developing an active labour market approach. Current measures to encourage educational participation include:

- Job Network members' access to a Training Account to provide work related training for eligible mature age job seekers
- Training Credits are also available for mature age job seekers who complete a certain number of hours in Work for the Dole or Community Work.
- Transition to Work program⁷— preparatory assistance program including skills assessment and training, support and job seeking advice.

This strategy blueprint appears to make only a weak commitment to education and training components of employment assistance targeted to socially-excluded groups such as low-skilled older workers. There is a greater reliance on achieving more flexibility in the workplace through

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further de-regulation of the labour market.⁸

So the recent OECD report on Australia's progress towards dealing with the ageing workforce criticised the lack of stronger measures to assist low-skilled older workers to obtain employment, particularly their access to education and training and employment programs.⁹

Regarding education and training, it recommends that '... older workers should also have the same opportunities as younger workers to participate in training and thereby maintain and develop their skills. It suggests that there be —

- More training possibilities for low-skilled and non-regular workers—recognising that low wages, less certain jobs and employer attitudes create barriers to access
- Subsidies for training for low-skilled older workers—since employers need to be encouraged to invest in older workers in anticipation coming skill shortages and training can be negotiated as part of collective agreements
- Measures to improve labour market outcomes for older workers—including job assistance for those unemployed and not receiving income support
- Workplace improvements—more resources are needed for rehabilitation and workplace re-design to support increased participation by those on the disability pension

Despite Australia's increasing levels of participation in education and training, there is a widening gap between high-skilled and highly paid workers and the low-skilled and low paid. It is argued that 'breaking the nexus between low skills and non-participation' requires more decisive measures by government.

Therefore, there is scope for the Federal Government to strengthen targeted education and training as a component of its active labour market policies for older workers. An opportunity should not be lost to capitalise on the strengths of the Job Network, particularly its community providers, to expand formal and informal learning options for older workers.

What is required to promote and support the participation of older workers in learning needs greater discussion. The outcomes achieved should be broadly conceived, consistent with goals for healthy and productive ageing and life-work balance, not limited by a training paradigm based in an earlier period.

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Employers and older workers

It is in the interests of employers to engage with the goal of increasing the participation of older workers. In doing so, they will need to have regard for the great gap that divides the better-educated professional employee from those working in low skilled and less secure jobs.

The 'knowledge economy' has made it necessary for employers to consider how workplaces can promote learning at work, particularly for those who have gained employment in the new knowledge-creating industries through their formal educational qualifications.

In its *20:20 Australia Series*, the Hudson Group summarises the kind of thinking that will be required of employers and gives some insight into the workplace parameters that will influence attempts to extend the years of active working life.¹⁰

The retirement of experienced older workers will create skill shortages and lead to heightened competition and the poaching of scarce talent. There will be pressure for skilled migration and intensified by the globalisation of business. It will be seen to be cost-effective to retain workers by more highly valuing the individual contributions of workers and actively tailoring work to meet their needs for work satisfaction and life-work balance.

While the goal is to retain older workers, there are concerns about the 'quality of the Australian labour market' as this is reflected in the skill levels of Australian workers and their post-school educational achievement—a majority of older workers may not have the capacities to secure ongoing paid employment. In highlighting the new 'knowledge-work' and knowledge-based industries, the issue is not simply about the sheer quantum of workers available, but also of their available skills, motivation and ability to learn.

The report highlights that work based on knowledge-creation will place a premium on retaining those workers who are adaptable. The ability of organisations to retain older workers is very dependent on how work is organised in a context where contemporary work is said to become more knowledge-based, flexible, de-centralised and dependent on communication, teamwork and problem-solving.

Adaptability is thus one touchstone for reorganising work practices to promote learning as part of work. Those most at risk of redundancy have had fewest opportunities to acquire new skills and develop a positive orientation to learning. Conditions not favouring adaptability such as the lack of mobility can result from long tenure in organisations (the public sector is cited). Thus work needs to be designed to promote adaptability through activities that demand learning, such as 'cross-functional' project teams. The UK concept of 'learning accounts' is recommended as a means of encouraging older workers to undertake activities through which one



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can ‘learn to be a learner’ and thus improve learning and performance.

Retaining older workers will save recruiting costs, maintain institutional memory and technical knowledge and give a higher return on investment in training. However, it is recognised that the ‘intrusion of work into life’ is currently working against this goal. The report proposes a range of measures that will lead organisations to tailor work demands to fit more with individual life-goals, including—

- planning transitions for valued workers who plan to retire to enable them to achieve ‘sea-change’ goals of balancing work and life
- enhancing work as a learning environment by stretching the expertise of workers, through such strategies as ‘cross-functional job changes’
- recognising the drivers for learning associated with contemporary work, that ‘lifelong learning has become an essential for both employability and career progression’.
- tailoring training for older workers to their aspirations and arrangements to improve work-life balance, using learning accounts and development plans to promote learning at work

The implication is that the learning of older workers should be broader than job-specific skills, and be designed to foster lifelong learning capacities including foundation skills and literacies such as computing. The value of learning as an adaptive activity in later life, is indicated.

Employers are urged to ‘manage age-specific risks’. More flexible work practices allowing employees to manage work-life balance will be needed, particularly for women with a primary responsibility for child care. The ageing population will make elder care for workers a larger issue than it is now, and employers will need to counter ageism and resentment about the ‘burdens’ of ageing and older people. The potential for age discrimination to work against retention of older workers requires employers to think hard about appropriate ageing policy.

The report notes that the problem of the ageing workforce is appearing just as newer service industries are creating knowledge-based work and as employment is becoming less secure. This change-environment makes the transmission of expert knowledge difficult if the ‘socio-cultural context of work’ is dysfunctional, since it is trust and reciprocity, collaboration and social cohesiveness, that make possible the sharing of expert knowledge which is tacit and embedded in personal experience. ‘Knowledge work’ now underpins organisational effectiveness which ‘relies on the purposeful association of an organisation’s members, their mutual commitment and their sense of belonging’.

The Hudson report addresses employment in the high-skilled ‘new’ economy rather than the older worker in the ‘old’ industrial economy. High-skilled older workers participate almost as much in learning as their younger counterparts, and they go on participating in paid work for longer. As an important discussion of lifelong learning policy has shown,

the 'knowledge economy' has both increased demand for learning among the high-skilled and at the same time, increased inequality in the distribution of education and training opportunities (Watson 2003).

As a result, there are different 'opportunity structures' for high-skilled and low skilled groups within the education and training system. Those in employment, particularly high-skill employment, have much more access to employer-provided training than low-paid workers, and the low-skilled have less 'pay-off' in increased wages from gaining additional low-level qualifications. Those marginal to the labour force or in low skilled work have less incentive to participate in the absence of government assistance (Watson 2003).

Therefore, a key area for action is public education programs designed to overcome age discrimination by employers—it is of little value to an older worker to invest in training, if employers are reluctant to hire them. The OECD Report (OECD 2005:90-101) highlighted employer attitudes and age discrimination as an area for action.

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Transitions and social risk management

Since low-skilled older workers will be a focus for national policy, it is important to understand how such groups may perceive the incentives and barriers to their participation in education and paid work. Their motivation will be influenced by a 'web' of social policy considerations that will affect whether learning is an attractive proposition.¹¹

A recent conference highlighted the need to rethink frameworks for Australian social policy, offering insights into the way 'adult learning' is likely to be positioned in the broader picture. Social policy now needs to take into account the breakdown of the earlier linear patterns of transitions over the life-course and the complication of social roles (caring, working, learning, leisure) for both men and women in contemporary life.

The passing away of the old policy settlement based around goals of secure full-time employment for the male breadwinner in an industrial economy—the workers' welfare state—has left institutions including formal education out-of-step with new patterns of transition.¹²

That more complex life-course transitions are now driving adult learning was recognised by *Adult Learning in Australia*, reflecting the earlier argument embedded in the Ministerial Declaration on ACE (2002)—

... all adults need to acquire and maintain the new skills and knowledge required in a modern, complex society and to manage and influence the transitions they face throughout their lives. These transitions are now more complex and for many, more abrupt. Patterns of participation in the workforce are changing: many people hold a range of jobs, often in different locations, throughout their working lives. Others have intermittent and unstable attachments to the workforce or no workforce experience at all. Pathways into and out of the workforce and retirement are diversifying. Family structures and relationships change and evolve. People are living longer and pursuing active healthy retirements, but isolation and loneliness is a growing social problem among older Australians ...

It is suggested that Australia can learn from European social policy perspectives that makes use of the concept of the 'management of social risk' in order to understand how people behave in 'transitional labour markets'.¹³

Transitional factors are clearly driving demand for formal and non-formal learning by client groups that have already used education and training to manage their changing labour market participation.¹⁴ However, not all groups are equally advantaged in their ability to manage the risks of transition, especially those with less schooling who face greater risks

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and uncertainties in the knowledge economy.¹⁵

Increased labour force participation by older workers may entail social risks such as the opportunity costs of training (activities or income foregone, as well as the psychological risks) or the risks of competing in a restrictive labour market characterised by employer prejudice against the older worker and low 'pay-off' of training. These perceived risks can be managed by appropriate social policy measures.

'Social risk management' refers to the desirability of assisting individuals to deal positively with the risks of adversity such as unemployment, illness and poverty through sharing the responsibility among families, employers and government. In this way, 'risk prevention' and 'risk mitigation' can be developed as an alternatives to reactive coping.¹⁶

According to this perspective, those most 'at risk' are more prone to non-adaptive risk perception—for example, people are generally more averse to loss than attracted by gain (risk-aversion). They will rather take the risk of uncertain and potentially large loss rather than incur a certain small loss (risk-taking) and according to how they frame the situation, may give greater weight to present values than future prospects, resulting in short-sighted decisions that over-estimate short term risks. Thus social policy can assist individuals (and communities) with life-transitions through strategies directed to different risk conditions, for example, by—

- offsetting risk-aversion through wider opportunity sets—for example, a combination of education and employment measures to support people attempting to move from welfare to work
- removing disincentives for speculative risk-taking—for example, retirement policies that encourage older workers to 'gamble' on life-chances by leaving work early or short-term 'hire and fire' practices by employers
- assisting people to 'extend the expectation horizon' for people engaging in risky employment strategies—for example, by extending continuous training opportunities rather than restricting them to immediate vocational skills.

Ageing policy touches at many points upon the increased complexity of 'transitions' at different stages of life and managing the increased 'social risks' people experience in making these transitions.

A 'transitions and social risk' perspective can make an important contribution to national policy on adult learning. It provides a powerful rationale for the role that community-based programs can play in reaching low-skilled older learners. As the work of Gelade et al suggests, ACE organisations have the flexibility to assist learners with the 'risky learning' of work and life changes.¹⁷

The contribution of the adult community education sector and the learning community movement to national policy on adult learning is discussed further below.

A 'transitions and social risk' perspective can make an important contribution to national policy on adult learning ...

it supports the key role of community-based programs for low-skilled older learners





A broader concept of adult learning

There is a need to develop policy perspectives on adult learning that emphasise the contexts of learning as much as formal participation and qualifications. It is important to recognise the diversity of client groups and the ways they approach learning, and to assess what needs to be done for those groups who are missing out on learning at work, whether this is linked to formal training or not.

While lifelong learning advocates emphasise that the community context is crucial to extending opportunities, the workplace is equally an important site of learning for older adults. This is especially so for those with low skills who do not currently access training at work and who see little benefit in training for an uncertain future. Beyond the workplace, the evidence is the participation in low level formal training may have negligible or even negative labor market consequences for older workers. This is a disincentive to participation for people with low levels of schooling. Rather, it is training in combination with employment that is perceived by those involved as paying off, and hence the attitude of employers to older workers and their skill learning is influential. Age discrimination is widely recognised as a major barrier to improving the situation of older workers.¹⁸

The Committee for the Economic Development of Australia has recently¹⁹ concluded that ‘a critical challenge is the low level of formal training provided to people aged over 45 years’ and noted the reluctance of older workers to invest time and money in learning activity with little apparent immediate return. It urges the adoption of lifelong learning approach without which goals for a productive, older workforce are unlikely to be achieved.

The CEDA policy statement highlighted the need for thinking beyond the formal institutions which need to become more flexible in responding to the diverse needs of the workforce. Mature-aged workers require ‘a variety of learning strategies’ and employers need to make greater efforts to appreciate the needs and motivations of older workers and to design work accordingly.

The conclusion of the CEDA policy and particularly the supporting papers by Buchanan and Noonan is to go beyond formal education and training to a broader concept of a ‘workforce development strategy’ to promote the learning of older workers. Buchanan cites Schofield’s definition as a key to new policy directions:

Workforce development is defined as those activities which increase the capacity of individuals to participate effectively in the workforce throughout their whole working life and which increase the capacity of firms to adopt high-performance work practices that support their employees to develop the full range

Mature-aged workers require a variety of learning strategies and employers need to make greater efforts to appreciate the needs and motivations of older workers and to design work accordingly.

of their potential skills and value.²⁰

Buchanan cautions that this should not be reduced to the development of workers through training, but encompasses the development of workers' jobs—the design of work and working arrangements.

In other words, what is needed in policy is not more emphasis on the response of mainstream institutions but an integrated view of learning and development in the contexts of workplace and community. Noonan argues the importance of tacit and informal knowledge in shaping vocational expertise skills, and elsewhere suggests that Australia needs to think outside the institutional square:

The key question is whether or not Australia is poised to make the transition, from a largely standards and qualification based system, to a broader construct of workforce preparation, which subsumes, but goes much further than, current approaches to knowledge and skills and the means by which they are acquired.²¹

Australia is challenged to get out of the straightjacket of institutional thinking and move towards a more ecological view of adult learning. Consistent with the broader 'ecological' thinking of 'workforce development' is the idea of 'skill eco-systems' that has emerged from research into the future of work.²² This concept recognises that productive capacity of a workplace needs to be understood in an holistic way—as the result of the interplay of a range of factors:

Skill ecosystems are concentrations of workforce skills and knowledge in an industry or a region. They are shaped by: the business environment (competitive pressures, inter-firm relationships, access to finance and product markets); the technology in use; the role of government and industry regulators; modes of engaging labour and the operation of labour markets; production processes and the way work is organised; and the quality of education and training and its ability to meet industry's and workers' developmental needs.²³

In this perspective, the formal training of workers without regard to the ecology of productive work may have little impact. How learning is arranged and integrated with the conditions of work is crucial to the creation of value through a highly-skilled workforce. Moreover, organising learning at work can overcome barriers and motivate participation for those who have missed out on post-school education—as programs for workplace adult literacy readily demonstrate.

The industry context—understood, preferably in relation to its regional or 'community' setting—is important for creating conditions that can make adult learning possible for older workers who are unlikely to risk individual learning without clear returns. This assumes that government policy aims to promote industry that produces high-quality goods and services and rewards skilled work. The alternative of low-skilled work and low-paid work offers a poor rationale for promoting learning to participants.

Australia is challenged to get out of the straightjacket of institutional thinking and move towards a more ecological view of adult learning.

Thus the goal of maintaining the productivity of older people is not simply about promoting adult learning in the hope that it will enable them to continue long in productive work. This goal presumes thinking on a bigger scale about the design of work itself, and a commitment to a broad strategy for workforce development as CEDA suggests.

It is important to recognise the diversity of client groups and the ways they approach learning, and to assess what needs to be done for those groups who are missing out on learning at work, whether this is linked to formal training or not.

The key question is whether or not Australia is poised to make the transition, from a largely standards and qualification based system, to a broader construct of workforce preparation, which subsumes, but goes much further than, current approaches to knowledge and skills and the means by which they are acquired.—Peter Noonan



Learning communities and ACE providers

Thinking of adult learning in the broad renders obsolete a sectoral view of education and training. The broader view asks how schools, universities TAFE institutes and other providers, including ACE organisations, can contribute to expanding options for adults in contexts beyond the institutions—particularly in the workplace or the local community.

To follow the theme of skill ecosystems, it is the ecology of provision that matters—the relationship of providers to their wider social and economic contexts. Hence Peter Kearns' emphasis on 'holistic and joined up strategies' for promoting lifelong learning through collaborative arrangements and the importance of the learning communities movement.²⁴

As respected commentators have noted, the sectorisation of Australia's education and training system and its Federal-State division of funding responsibilities have created obstacles to widening lifelong opportunities. This makes it difficult to bring adult learning to the centre of policy. One unfortunate effect has been to portray the 'community' context not as integral to the work of all educational institutions, but as the marginal territory of a 'fourth sector' of non-government agency.

For fifteen years the construct of an 'ACE sector' has been useful in according recognition to community-based adult education providers. In turn, these organisations have expanded the scope and reach of the national training system through accredited VET in NSW and Victoria. However, there is now a growing divergence across the States and Territories in policy frameworks, funding regimes and organisational models and capabilities.²⁵

Attempts through the Ministerial Declaration to define ACE to encompass the diversity of organisations and State and Territory arrangements cannot be said to have galvanised action in the agreed directions. To the extent that it has identified 'adult learning' and 'lifelong learning' with the community sector, the idea of an 'ACE sector' has possibly worked against a comprehensive national framework for adult learning.

Rather than seek a unifying view of adult community education 'sector' and its features, it may now be more useful to work with concepts such as the 'learning community' and to focus on the organisational models that promote community-based learning initiatives. In this way, ACE organisations can take a leading role in catalysing adult learning within communities, in partnership with TAFE institutes, business, government and other agencies.

Some ACE organisations are well-placed to play a key role in the collaborative approach that *Adult Learning in Australia* recommended—



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Those community providers who have developed an 'integrated services' capability have most to offer an ecological view of learning in community, which embraces a view of industry in its regional context



particularly those experienced in developing pathways to learning and employment for older workers.

Many have pioneered programs that today integrate components such as literacy and foundation skills, accredited vocational training and general courses with employment services.²⁶ Most recently, the report *Securing Success* showed again (Gelade, Catts and Gerber 2003) that there are well-developed methodologies for working with disadvantaged older clientele in community contexts.

At the risk of over-simplifying the multi-faceted expertise of these organisations²⁷, they embody the strengths of community-based adult learning in some of the following ways—

- They develop, through informal and formal learning, the attributes necessary for adults to participate in lifelong learning—confidence, enabling skills and willingness or motivation.
- They provide 'wide opportunity sets' so that clients can combine or integrate a range of experiences to manage difficult transitions—for example, by creating pathways²⁸ for unskilled women seeking to return to work.
- They provide a breadth of outcome across programs, or multiple outcomes for clients rather than narrowly focused objectives—so, for example, employment outcomes are reinforced by related personal skills and capacities.²⁹
- They provide opportunities in small communities where there is no other provision, for particular clientele such as older men in rural communities—as work on farmers' transitions and learning in rural fire services illustrates.³⁰
- They provide alternative contexts for women to access accredited VET, in some States in collaboration with TAFE, or otherwise.³¹
- They strengthen social networks through the employment of volunteers, who contribute to the capability of the organization, connect it to other agencies, promoting 'social capital' and increasing its role in 'catalysing' community learning.³²

Those community providers who have developed an 'integrated services' capability have most to offer an ecological view of learning in community, which embraces a view of industry in its regional context. They are focused on developing lifelong learning capacities for particular clientele who lack these attributes and who are least likely to participate in formal institutions or who lack access to work-based training. Without this kind of development of confidence, enabling skills and motivation to learn, it is doubtful how effective formal learning can be for many older people thinking of changing their work patterns.

This is the strongest argument for greater government support for community-based adult learning organisations. They have the capability to lead 'learning community' initiatives and to contribute to national priorities for a productive, ageing workforce. They can reach groups of people that

do not participate in learning, have low skills and as a result are at risk of involuntary retirement, or who are not actively working.

For advocates of the ACE sector, it is important to appreciate that a national policy on adult learning will be driven by imperatives such as the ageing population, and less by general arguments about the wider benefits of learning, important as it is to continue to argue the contribution of learning to individual and community well-being.

There is no doubt that higher demand for adult learning activities is likely to result from the ageing baby-boomer demographic, but governments are likely to continue with the position that much of this demand will be met via the market.³³ National policy is likely to be strategic and focused on outcomes for particular clienteles of older people.

... the strongest argument for greater government support for community-based adult learning organisations is their capability to lead 'learning community' initiatives and to contribute to national priorities for a productive, ageing workforce.





Conclusion

It is almost a decade since Australia subscribed to the OECD policy of ‘lifelong learning for all’ and there is little evidence of coherent strategies to address the obstacles to widening opportunities for those groups who have not benefited from increasing levels of education and training and the access this gives to paid employment.³⁴

It is argued that a coherent national policy on adult learning is needed to achieve policy goals for social and employment participation by older people emerging from the debates surrounding Australia’s ageing population.

Achieving these goals, particularly for older, low-skilled workers, will not come through an emphasis on institutional provision but rather through a more ‘ecological’ view of adult learning—one that emphasises the relationship of agencies to their community and concepts such as the ‘learning community’. Such agencies include not only educational institutions, but employers and industry associations and non-government organisations—the potential partners that need to come together to make a reality of strategies to expand learning opportunities.

This will require some fresh thinking about our categories of ‘education and training’ and ‘learning’, ‘industry’ and ‘community’ and the way these have come to be opposed in policy discourses in the last fifteen years. The policy debate should avoid treating learning community initiatives in isolation from workforce development strategies, and it will be helpful to get beyond fruitless distinctions between learning for life and learning for work that have plagued policy for decades.

Ageing policy also highlights the need to see adult learning in a broader social policy context, and not simply in terms of the education and training ‘responses’ to the perceived needs of low-skilled older workers. ‘Learning’ has to be understood in relation to working and work-life balance issues. The paper has suggested the perspective of ‘life-course transitions’ as a rationale for further policy work on the ageing population, one that will give full play to the breadth of purpose and outcome of adult learning.

The lack of a national policy perspective is now working against a broader participation in adult learning. There is every evidence that there is a falling away of commitment by the States and Territories to the goal of the Ministerial Declaration on ACE to ‘expand and sustain innovative community based learning models’ through partnerships government and community and social agencies.³⁵

This policy fragmentation will most affect those people who are the concern of ageing policy—those who are experiencing the ‘knowledge-

We need fresh thinking about our categories of ‘education and training’ and ‘learning’, ‘industry’ and ‘community’ and the way these have come to be opposed in policy discourses

gap' so eloquently identified by the Ministerial Declaration:

A 'knowledge gap' separates those adult Australians with high levels of educational attainment who most effectively use our learning resources, from those who least effectively use those resources: people who are poor, have disabilities, have low levels of literacy and numeracy, are from non English speaking backgrounds, are geographically and socially isolated, and Indigenous Australians. We also face a knowledge gap between younger and many older Australians as more young people are reaching adulthood and entering the workforce with the benefit of educational opportunities and outcomes that were denied to many older Australians. Our capacity to ensure that all citizens lead a 'productive and rewarding life in an educated and just society' is diminished by this gap and even more by its growth.

The paper has recommended that a national policy on adult learning provide a framework for resourcing a national program of 'learning community' initiatives. Such a program would target the most educationally disadvantaged groups of older people. It would require the leadership of community providers who have demonstrated a capability to work with clienteles experiencing the 'riskiness' of contemporary labour market transitions.

Such a policy initiative would begin to address the current fragmentation of Australian policy on adult learning and its subordination to issues of Federal-State VET funding. Adult learning requires policy that is not framed in terms of the sectoral purposes of education and training, including, the 'sectoral' claims often made for adult and community education providers, who will continue to play a key role.

Only a broad policy on adult learning can begin to address the desired goals for healthy and productive ageing recently outlined by government. For those who have enjoyed full social and economic participation, these goals are doubtless, desirable and practicable. Reaching those older people who have missed out on learning earlier in life calls for an effort that is national in scope and commitment.

Reaching those older people who have missed out on learning earlier in life calls for an effort that is national in scope and commitment.



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- ¹ The term ‘adult learning’ has been used inclusively by the OECD in its recent review of adult education: ‘The concept of adult learning ... encompasses all education and training activities undertaken by adults for professional or personal reasons. It includes general, vocational and enterprise based training within a lifelong learning perspective.’ (OECD 2003:8).
- ² See the comprehensive report by Peter Kearns (2005), *Achieving Australia as an Inclusive Learning Society. A Report on Future Directions for Lifelong Learning in Australia*. Canberra: Adult Learning Australia and the outcomes of consultations on Adult Learning in Australia.
- ³ See Kearns 2005 for a comprehensive review of Australian policy in the global context.
- ⁴ The report cites the DEST-commissioned research on older learners, *Securing Success* (Gelade Catts and Gerber, 2003) which documented in detail methodologies the community providers use to work with older learners. This report can be read in the context of other work on barriers to access since 1990.
- ⁵ Summary of key issues of the consultation accessed at http://www.dest.gov.au/sectors/training_skillspolicy_issues_reviews/reviews/previous_reviews/adult_education_in_Australia, on 1 June 2005.
- ⁶ See especially, William Mitchell and Warren Mosler, 2003, *The Intergenerational Report – myths and solutions*, Centre of Full Employment and Equity, The University of Newcastle, Working Paper No. 03-10. Accessed at <http://e1.newcastle.edu.au/coffee> on 20 June 2005.
- ⁷ The transition to Work program ‘offers a range of individual and flexible assistance to help parents, carers or mature age people aged 50 years and over who are looking for paid employment or planning to join or rejoin the workforce after an absence of two or more years. The primary objectives of the Transition to Work program are to provide preparatory assistance to an individual that builds self esteem and addresses confidence issues and improves the individual’s prospects of obtaining paid employment through assessment, skills training, support and advice on how to get into the job market.’ *Australia’s Demographic Challenges*.
- ⁸ Compare the policies for mature workers in the earlier *National Strategy for an Ageing Australia* Background Paper on the Mature Aged Workers (Office of Ageing, 1999). That paper had an unequivocal commitment to lifelong learning as a necessary condition achieving for greater participation by older workers.
- ⁹ *Ageing and Employment Policies: Australia* notes the ‘new initiatives’ designed to increase participation of older workers and sees a need for policy coherence, stating that ‘it is not clear how these new policy initiatives are linked, if at all to the National Strategy for an Ageing Australia’. Education and training is one of the key areas of incoherence. It also criticised the timidity of measures to remove disincentives to work (in superannuation policy and income support), though generally endorsing the general direction of ageing policy.
- ¹⁰ The report draws on a wide range of OECD, US and European organisational development and human resources literature but is disappointingly thin in references to related Australian sources on organisational learning and training.
- ¹¹ OVAL (2002). *Major Research Program for Older Workers: Stage 1—Conceptual Framework*. Australian Centre for Organisational, Vocational and Adult Learning. Sydney: University of Technology. Sydney. This is a useful review of a wide literature on older workers.
- ¹² See the Ziguas, Considine, Hancock and Howe (2005) Background paper for the *Transitions and Risks: New Directions in Social Policy* Conference—From risk to opportunity: labour markets in transition (see following).
- ¹³ The *Transitions and Risks: New Directions in Social Policy* Conference at the University of Melbourne, (February 2005) canvassed the application of this framework (especially the German work of Gunther Schmid) to Australian social policy. and Schmid 2005. Accessed at <http://www.publicpolicy.unimelb.edu.au/conference2005/Index.html> on 2 June 2005.
- ¹⁴ In this way, the high participation of employed, qualified women in the ACE sector reflects the complex transitions they may be experiencing and the significance they give to less formal learning. Importantly, the advent of ACE-provided accredited VET (in NSW and Victoria) provided those female client groups with an alternative to TAFE.
- ¹⁵ See Kearns 2005 for a good account of European approaches to lifelong learning and an appreciation of the main arguments for lifelong learning policy from a life-course perspective.

- ¹⁶ 'Social risk management thus means appropriate framing of risks and overcoming risk aversion or speculative risk-taking [by means of] social rights, incentives or obligations', Schmid 2005:11).
- ¹⁷ See Gelade, Catts and Gerber, 2003.
- ¹⁸ See Thomson, Dawe, Anlezark and Bowman, 2005.
- ¹⁹ Committee for the Economic Development of Australia, *Lifelong Learning*, Growth 56.
- ²⁰ Kaye Schofield, as Reviewer for the SA Government's *Ministerial Inquiry into Skills*, cited in Buchanan, J. (2005), Whatever happened to life-long learning? Lessons from recent Australian vocational education and training reforms. In CEDA Report, *Lifelong Learning*, Growth 56.
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- ²² See Buchanan, J. et al (2001). *Beyond Flexibility: Skills and work in the future*. Board of Vocational Education and Training, NSW.
- ²³ Cited at <http://www.skillecosystem.net/about>. The Skill Ecosystems National Project, Department of Education Science and Training. See Loble, L. (2005). Lifelong Learning: Skill Ecosystems As A New Model, paper presented at the Transitions and Social Risk conference cited above.
- ²⁴ See the Learning Communities Catalyst at <http://www.lcc.edu.au/lcc/go>.
- ²⁵ This trend has been gaining momentum since 'training reform' first challenged adult community education. ACE providers were included in the ANTA Agreement and funds flowed to expand their role in vocational courses and workplace literacy. Now in NSW, the smaller rural providers deliver as many hours of VET as they do general adult education. In Victoria, there is a long tradition of integrating community services, general adult education, literacy and vocational courses. In both States, the privatisation of employment services has seen some ACE organisations tender for 'job network' services and integrate these with their accredited training and general program.
- ²⁶ The extent of this contribution of community-based learning warrants up-to-date research and documentation by the national association, though it has been well-documented. See Volkoff, Golding and Jenkin, (1999). For a comprehensive review of ACE research, see Golding, Davies and Volkoff (2001).
- ²⁷ See in particular the work of Victorian community educators documented through rich description by Delia Bradshaw and others. See, for example, Bradshaw, D. (1995), *Multiple Images, Common Threads. Case Studies Of Good Practice In Adult Community Education*. Melbourne: ACFE
- ²⁸ For a detailed study of ACE-VET pathway planning, see McIntyre and Kimberley (1997).
- ²⁹ See Clemans, Hartley and Macrae (2003).
- ³⁰ See Foskey and Avery (2003) and Hayes, Golding and Harvey (2004).
- ³¹ See Volkoff, Golding and Jenkin (1999).
- ³² See Falk, Golding and Balatti (2003).
- ³³ Certainly, the ageing population will increase demand for adult learning from retired people, but government is unlikely to support ACE just for this reason, even if learning confers benefits such as a healthier life on older learners. Higher demand is clearly following concentrations of more affluent and educated older people who choose course-taking as a retirement activity. A wide range of retirement activities would be regarded as contributing to healthy ageing, funded by individuals without government needing to intervene to improve the outcome.
- ³⁴ Watson, L. 2004. Lifelong Learning in Australia: A Policy Failure. Paper presented to the Australian Association for Research in Education National Conference, November. See also Watson, L. 2003. *Lifelong Learning In Australia*. Report 03/13. Evaluations and Investigations Programme, DEST. See also the comprehensive Kearns paper already referred to.
- ³⁵ The NSW government has virtually withdrawn from direct funding of its adult community education sector while the Victorian government has expanded funding, recognising the key regional development role of its community agencies. Queensland has published a lifelong learning policy in line with its whole-of-government 'smart-State' philosophy, while Tasmania has established and resourced a 'state of learning' strategy and a State-wide institute of adult education. See Kearns (2005) for detailed information.