

Lifelong Learning and the Financing of
Compulsory and Upper Secondary Education

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Abstract

This paper was written to identify the resources required to make lifelong learning affordable. It assesses the role of public policy in helping set the conditions for lifelong learning with particular reference to financing compulsory and upper secondary education.

The state's interest in education

Primary and secondary education provide the foundations for subsequent education, informal learning², and civic engagement. The state has a particular interest in ensuring that its inhabitants are equipped for the responsibilities of adult citizenship and work since failure to attend to these tasks places the survival of the state itself at risk. Seen from this perspective, education – the foundation for lifelong learning – is pivotal to the survival of Canada as a nation. Because education is a responsibility constitutionally reserved to the provinces, the establishment of the foundation for lifelong learning through primary and secondary education is a responsibility of each of the provinces.

¹ Charles Ungerleider is currently seconded from The University of British Columbia to the position of Deputy Minister of Education for the Province of British Columbia. The views expressed in this paper are his and do not represent the views of the Ministry of Education or of the Province of British Columbia. The author is grateful to Barry Anderson for his help in the preparation of this paper.

² “Informal learning is any activity involving the pursuit of understanding, knowledge or skill which occurs outside the curricula of institutions providing educational programs, courses or workshops.” D.W. Livingstone, Director of the national research network for New Approaches to Lifelong Learning, Ontario Institute for Studies in Education.

Resources required for lifelong learning

Three conditions necessary for lifelong learning are public support for formal education, equality among citizens in their attainment of learning outcomes, and inexpensive lifelong learning opportunities.

Canada provides the basic resource needed for making lifelong learning a possibility for all: an educated citizenry. Despite inter-jurisdictional variation, Canada provides significant financial support to the provision of education from kindergarten to grade 12. The result is that most young Canadians attend school and attain the knowledge and dispositions required for adult citizenship and work.

Lifelong learning depends for its success on equality among citizens in their attainment of learning outcomes. However, all citizens do not value lifelong learning because not all have succeeded in acquiring the foundations for lifelong learning during their primary and secondary education. The most common problem is poverty. Children of the poor are too often denied the full benefit of public education; they rarely achieve the same levels of proficiency in foundational areas as their more advantaged peers. As a consequence, they are often employed in work where learning is not valued and often earn such low wages that they cannot afford to take part in the learning opportunities which are available to others.

Lifelong learning for all citizens also depends on the availability of inexpensive learning opportunities. Much has been accomplished in this regard over the last century. Libraries, for example, are widely available, and books are of such low cost that they are very widely distributed among the population. Technologies, such as radio, television and Internet-connected computers have reduced the cost and increased the availability of high quality learning resources.

Making lifelong learning more affordable

Lifelong learning is proliferating. Older people are beginning to access learning opportunities to enrich their retirement, people with little success in formal compulsory schools are seeking access to learning opportunities to improve their career prospects, employees are enrolling in educational programs to improve their work skills, and educational programs are being offered as recreational activities to a public that has developed a thirst for learning. The expansion is so rapid and vast that considerations of affordability need to focus on areas that are of greatest concern to society.

Although conventional wisdom holds that it is more expensive to society to make lifelong learning available to all, this may not be the case. It may be possible to redirect existing expenditures, to make use of relatively inexpensive forms of lifelong learning, and to permit users to bear the cost of those forms lifelong learning that are not essential to the state's interest in citizenship and work.

Focusing existing resources

The population of developed countries is aging. Relatively fewer people will be in the age groups requiring expensive K-12 and post secondary education. This will release money and professional talent into lifelong learning endeavours.³ This can already be seen in the expansion of adult and continuing education programs offered by traditional institutions.

An aging population means that many potential consumers of lifelong learning are, or will soon be, retired. This will reduce the need for direct public investment and free public funds for high priority areas where learners lack the resources needed to take part in a learning activity or where the learning activities require a subsidy in order to be available to the intended audience.

³ Developing countries face a different problem. Their predominantly young populations require significant investment in basic education. They are likely to have few extra resources to provide lifelong learning opportunities.

It may be possible to lower the cost of lifelong learning by avoiding its use as a remedial device. Research⁴ shows a strong relationship between small classes in the early years and avoidance of remedial programs. For example, in British Columbia 10 – 12% of educational expenditures are for remedial work to repair the consequences of earlier school failures. Eliminating early school failures would probably not save money in the over-all budget, but it would alter the nature of students' subsequent ability to participate in lifelong learning. Instead of using lifelong learning oriented towards remedial reading and basic skills, programs would be freed to address more advanced personal and career development programs.

Reinvesting the benefits of formal education

Investment in elementary-secondary education saves governments money. Improving foundational knowledge and graduation rates reduces public expenditures in other areas. For example, in British Columbia, one longitudinal study of grade eight and nine students found that 85% of all the welfare money spent on these students was spent on those who did not graduate from high school. Thirty-three percent of those who did not graduate drew income assistance payments, while only 6% of graduates did so.⁵

Graduates of the K-12 system have much lower rates of contact with the justice system. A successful K-12 education saves money by avoiding incarceration costs. It also saves money by avoiding the direct costs of crime. British Columbia tracked approximately 84,000 students in grades 8 and 9 one year past their normal graduation date. 32,400 (39%) did not graduate. This group accounted for 503,600 (93.5%) of the days in custody. 52,400 (61%) did graduate. This group yielded 34,800 (6.5%) of the days in custody.⁶

⁴ Finn, Jeremy D. and Achilles, Charles M. "Answers and Questions About Class Size: A Statewide Experiment." *American Educational Research Journal*, Vol. 27, No. 3, 1990

⁵ British Columbia Ministries of Attorney General, Children and Families, Education, and Social Development and Economic Security. Draft Working Paper on the Outcomes of Education. 1999 Use of income assistance for the two groups was estimated from a cross section of Income Assistance recipients. This assumed both groups use Income Assistance for the same length of time. The groups were followed until two years after their expected graduation dates.

⁶ British Columbia Ministries of Attorney General, Children and Families, Education, and Social Development and Economic Security. Draft Working Paper on the Outcomes of Education. 2000

Educated citizens make more effective use of the health care system than do those who do not complete high school. Compared to non-graduates, high school graduates use preventative medical services 11% more frequently, make 2% fewer multiple visits to doctors, have better knowledge of health behaviours, have 13% better general health status, and have families which function better than those of non graduates.⁷

Finally, the educated citizen generates more wealth than the non-educated. As investments in education rise, national wealth increases and with it the ability to reinvest in lifelong learning. The reinvestment can be done by newly wealthy citizens, or by a state with higher tax revenues, or a combination of both. In developed countries, sufficient funding and learning opportunities are not likely to be a general problem, though action will be required to ensure opportunities are available to a broad range of social classes.

Making lifelong learning more affordable

Societies that do not invest in continuous learning, particularly in their business and industrial sectors will rapidly fall behind competitors, with resultant losses of income and reductions in living standards. So long as members of the society realize the role played by lifelong learning in maintaining economic growth and development, sufficient funds are likely to be available.

In the simple case, the problem is to get employers and workers to see the value to themselves of investing time, energy, and money in further learning. This is not always easy to do. Initial costs may be high, or an employer may feel that an educated work will leave for a better job with another firm, thereby removing the benefit of any employer paid learning.

A more difficult situation arises when learners do not have the basic skills required to take advantage of learning opportunities. This situation usually requires active government intervention justified on the grounds that under-employed or unemployed citizens are the

⁷ Calculated from data in “Statistical Report on the Health of Canadians,” prepared by the Federal, Provincial and Territorial Advisory Committee on Population Health, 1999.

recipients of costly social services. While governments will be called upon to provide the basic learning opportunities needed by people excluded from the labour force, private sector agencies are likely to be called upon to provide more learning opportunities for their employees.

Lifelong learning is also an opportunity for private development. Elder hostels are an example of connecting learning to tourism. Each summer, large numbers of seniors travel throughout Canada, using hotels, dormitories, busses, trains and planes, in search of company, travel and knowledge. It is the search for knowledge on the part of people who have disposable income that supports the tourist facilities used. Elimination of learning opportunities would probably diminish the rest of the tourism industry. There is a social justice issue arising from the inability of many elders to take part in such programs for want of money. Should equalization efforts be made on their behalf as was done in the schools when they were young?

Supporting lifelong learning with public policy

There are areas in which the development of public policy could increase the use of lifelong learning. First, policy initiatives could be developed in order to ensure that all students - regardless of social class, ethnic background, or family circumstance - complete the public education system with basic skills and a love of learning that form the foundation for lifelong learning. Much remains to be done in this area. Until recently, schools have had little information on their performance. Progress is now being made as public school systems have begun to more carefully assess the results of their work.

Second, the cost of public post-secondary education could be reduced or eliminated, expanding post-secondary opportunities for secondary school graduates for whom the cost of post-secondary education is a significant barrier.

Third, governments could further develop tax policies that encourage employers to develop lifelong learning opportunities for their employees. This is especially pressing because many employees are now working in very small firms. This means the firms may not be motivated to train staff because mobility within the company is not possible or they fear that

another employer is likely to reap the benefit of investments in an employee. Tax incentives large enough to cause a growth in learner participation rates should be attempted. In this regard, some countries have developed an education tax. The tax creates a “use it” for an employee or “lose it” to government situation. Tax incentives to business should be complemented by incentives to individuals.

Fourth, governments need policies that enable them to regulate private education providers. Licensure and regulation should be considered as a way to ensure quality control in the provision of lifelong learning opportunities.

Fifth, governments should develop policies that support the development of low cost delivery methods. Television, radio, and print media are effective ways of disseminating information. Low cost methods of delivering interactive opportunities are now desperately required. The Internet may support the emergence of some of them, but will only work if learners are connected. Connectivity can be affected by government policy.

Sixth, minimizing the cost to the learner is a high priority. To this end, government could develop policies that encourage development of educational opportunities of short duration. Government policies addressing tuition are common because tuition costs are often viewed as a major barrier to access. Opportunity costs, such as lost wages, and costs other than tuition, such as travel, childcare, supplies, and equipment are also frequently barriers to access for many learners. Failing an ability to shorten the length of time required for training, governments will need to find policies which support the key costs likely to deter students from important learning opportunities.

Conditions under which lifelong learning can be made more affordable

First, learners must possess the fundamental skill needed to enable them take an active part in their learning. Reading, writing, analytical and quantitative skills, and a willingness to do the “work” that is entailed in, and a love of, learning should all be present. These factors as well as the dispositions needed for citizenship need to be developed in the K-12 system.

This fundamental condition is not yet met in socially equitable ways. Take, for example, the plight of aboriginal learners in British Columbia.⁸ Approximately a third of those who enter grade eight graduate from high school. Many of the graduates possess degrees that do not include lack senior courses in math, science, or language. The result of this is that in order for aboriginal students to take advantage of lifelong learning opportunities, they must first overcome deficiencies in prerequisites. They are handicapped in comparison to those whose studies included such courses.

Aboriginal students symbolize what happens to many children born into poverty. Such children frequently do not have the advantages of their more affluent peers. They are less likely to have and be familiar with books and other materials to stimulate their interest and provide knowledge of the world. They often arrive at school with more limited vocabularies and experiences than peers who are not poor. The first step to making lifelong learning a reality for children of poverty is to ensure their success in primary and secondary education.

Second, the sites at which learning can be made available need to be near the potential users. This implies using a dense network of existing facilities, such as K-12 sites, colleges, universities and institutes, as well as larger employers. It also implies using the Internet and broadcast mechanisms wherever possible.

Third, we must reduce costs by minimizing the time learners forgo income while they learn. This means opportunities need to be of brief duration, available at a variety of times and locations, and tied to things currently understood by the user.

The role of public policy in facilitating lifelong learning

British Columbia has established policies that may move the province towards a learning community. First, it is attempting to prepare all its future citizens to participate in lifelong

⁸ British Columbia Ministry of Education. "How are we Doing?: An Overview of Aboriginal Education Results for British Columbia." May, 1999 (<http://www.bced.gov.bc.ca/abed/599Slide.pdf>)

learning. It is doing this by investing heavily in a high quality K-12 education system that, despite some shortcomings, is increasingly successful in educating most children. For example, British Columbia has embarked upon a class size reduction initiative that ensures that kindergarten classes have no more than 20 students and classes in grades one to three have no more than 22 students. Small classes create the conditions to give learners a sound foundation on which to base further learning, reduce the need for remedial work, prompt them to enroll in more and more difficult of senior level courses, and increase the likelihood of their continuing on to post secondary education.

The province employs a variety of policy levers to ensure student success and school improvement. These include annual assessments in reading, writing, numeracy, and citizenship and social responsibility at grades 4, 7, and 10; publication of performance standards for reading, writing, numeracy, and citizenship and social responsibility; examination of performance in grade 12 courses; and school accreditation.

The province has frozen tuition for students pursuing public post-secondary education. It has also established a central credit registry for many post-secondary learning opportunities, enabling adults to accumulate and record credits from a number of institutions.

Tax and training advantages are available to unemployed and under-employed workers that make vocationally relevant learning opportunities available to those who need them most. In British Columbia, and Canada more generally, tax credits are available to employers who provide training for their workers.

Like other jurisdictions, British Columbia has embarked upon initiatives to support families that increase the likelihood that they can take advantage of lifelong learning. Such initiatives include pay equity, increased minimum wages, and after-school childcare.

Private companies have been encouraged to provide learning opportunities. In order to establish some quality control in the private post secondary sector, private providers of

educational services are now required to register with the Province. A quality control system is being established among the registered providers.

Although British Columbia provides modest support for community schools, it would be advantageous to determine how to better use the vast infrastructure of schools and post secondary institutions to better provide lifelong learning opportunities. Few other institutions are as well situated among the people, and few so under utilized.

Government also needs to determine how to use the educational tools that are built into public broadcasting, the Internet, and computers to better facilitate lifelong learning. British Columbia, for example, has chosen to create a provincial intranet linking all publicly funded educational institutions throughout the province. Many critical public issues, such as AIDS awareness for example, are far better addressed through sophisticated use of broadcast media than through formal or semi formal education

Conclusion

The provision of lifelong learning depends upon a vast and well-developed institutional infrastructure supported by policies and financing that ensure the acquisition of the knowledge and dispositions for citizenship and work. The nature of the institutions and policies needed depend upon context. Different demographic and economic factors prevail in developed and developing nations; these differences must be appropriately reflected in the institutional, policy, and material responses to the need for lifelong learning.