

Retired but not tired: Retirement a trigger for learning.

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A research report submitted to the Wits School of Education, Faculty of Humanities, University of the Witwatersrand in fulfilment of the requirement for degree of Master of Education.

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## **DECLARATION**

I declare that this research report is my own unaided work. It is submitted for the degree of Master of Education at the University of the Witwatersrand, Johannesburg. It has not been submitted before for any degree or examination at any other university.

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OHARA NGOMA-DISEKO

\_\_\_\_\_ (date & time)

## **DEDICATION**

This is dedicated to all the 'near-olds,' who continue to live a purposeful and meaningful life through learning and action in all its forms.

To my children, grandchildren and the journey of life-long learning.

## **ABSTRACT**

This qualitative study employing ethnomethodology investigated whether previously employed African women between 50-59 years, termed near-old, turned to learning as a coping strategy after losing their jobs. Reflexive discussions, termed 'herstories,' were analysed. Whether the women experienced true crisis as a result of cessation from work, how they made meaning as they aged and to what extent retirement was a catalyst for learning formed the central lines of probing.

The findings revealed that the near-old women did not consider the transition to old age a crisis. Crises in their experiences were more permanent and emotionally devastating. Meaning schemes and perspectives were transformed as they encountered unbearable work situations. Critical reflection on the situation led to action resulting in them exiting formal employment.

There was strong evidence of self-directed and life-long learning. The women sought out new knowledge and skills in order to cope in the competitive work of consultancy. Instances of positive adult development attested to Mezirow's theory of transformative learning and Brookfield's reflective thinking. The study highlighted the need to use adult education strategies in order to promote critical reflection and to '*conscientise*' older people about their deeply embedded beliefs that are often entrenched by their socialisation.

**Key Words: Near-old, crisis, trigger/catalyst; adult development, learning, self-empowerment, perspective transformation; self-directed learning, retirement and adult unemployment.**

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# TABLE OF CONTENTS

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## Contents

DECLARATION .....	i
DEDICATION .....	ii
ABSTRACT.....	iii
ACKNOWLEDGEMENTS.....	iv
TABLE OF CONTENTS.....	v
CHAPTER 1: RESEARCH CONTEXT/PROBLEM STATEMENT .....	1
Research Questions .....	3
Brief History of Apartheid Bantu Education .....	3
Personal frame of reference .....	4
Methodology.....	5
Motivation for the Study.....	7
The Value of Employment.....	8
Organisation of the report .....	8
CHAPTER 2: LITERATURE REVIEW .....	10
Introduction .....	10
South Africa’s Ageing Population.....	11
Implications of an Ageing Population .....	11
Ageing in South Africa.....	13
The Effects of Unemployment .....	13
Adult Development and Perspectives on Growing Older .....	14
Midlife as a ‘Crisis’ .....	14
Midlife as a transition .....	14

Theories of Adult Development.....	15
Ageing and ageism .....	16
Conceptualising Adult Development .....	17
Adult Development Theories and their Implications for the Practice of Adult Learning .....	18
The Psychological/Cognitive Approach.....	19
The Contextual/Socio-Cultural Approach .....	19
The Integrated Approach .....	20
LEARNING THEORIES .....	21
Self-Directed Learning.....	21
Experiential Learning .....	23
Criticism of Experiential Learning Theory .....	24
Mezirow’s Transformational Learning.....	25
Transformative Learning.....	26
Meaning schemes .....	26
Meaning perspectives .....	26
Cultural Context .....	27
Triggers for Perspective Transformation .....	27
Instrumental, Communicative and Emancipatory Learning .....	28
Emancipatory Learning .....	29
Structuring Meaning .....	30
Three Codes Shaping Meaning Perspectives .....	30
Critical Reflection .....	31
Brookfield on Critical Reflection .....	31
Conclusion.....	34
CHAPTER 3: RESEARCH DESIGN .....	36

Introduction .....	36
Restating the aims of the research .....	36
Philosophical approach to education and research.....	37
Tension between philosophy and practice .....	39
The Ethnomethodological Approach .....	40
Why Ethnomethodology? .....	41
Applying Ethnomethodology .....	42
The Sample.....	42
In-depth Feminist Interviews .....	43
Analysis Process .....	46
Ethical obligations .....	47
Conclusion.....	49
CHAPTER 4: FINDINGS.....	50
Introduction .....	50
Describing the Participants .....	50
Keketso Kau (KK) .....	50
Nontobeko Kente (NK).....	51
Freda Thebe (FT) .....	52
Mapula Rathebe (MR).....	53
Khosi Moloi (KM).....	53
Synopsis of Interviews .....	54
KK .....	54
Leaving employment.....	54
Midlife crisis .....	56
Financial difficulties .....	56



Seeking Opportunities.....	57
On-going learning.....	57
New Avenues .....	58
NK.....	58
Leaving Employment.....	59
Midlife crisis .....	59
Addressing Challenges .....	61
On-going Learning.....	62
New avenues.....	63
FT.....	64
Leaving Employment.....	64
Midlife Crisis.....	65
Ageing .....	65
Addressing Challenges .....	66
On-going Learning.....	69
MR.....	70
Leaving Employment.....	70
Unemployed.....	71
Financial Struggle .....	72
On-going Learning - Learning as Transformation .....	73
KM.....	74
Leaving Employment.....	74
Midlife crisis .....	75
Ageism.....	80
Interpretive Analysis .....	80

Contextual Themes .....	81
Apartheid as the Backdrop .....	81
Tradition and culture .....	83
Crisis or not? .....	85
Critical catalysts for learning.....	87
Being retired and unemployed .....	88
Conclusion.....	90
CHAPTER 5: DISCUSSION AND CONCLUSIONS .....	92
Introduction .....	92
Crisis or not? .....	92
Meaning-Giving to Retirement .....	93
Retirement as a Critical Catalyst for Learning.....	95
Gaining New Knowledge and Skills .....	95
Life-long learning .....	95
Self-directed learning.....	95
Instrumental learning and emancipatory learning .....	96
Perspective Transformation.....	97
Research design .....	99
Research Limitations.....	100
Implications of the Research Results .....	100
Conclusions .....	100
Recommendations .....	101
References .....	102
APPENDIX A: TRANSCRIPTS.....	<a href="#">106-105</a>

## CHAPTER 1: RESEARCH CONTEXT/PROBLEM STATEMENT

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After the *apartheid*<sup>1</sup> era, one of the key challenges that a democratic South Africa faced was the development of its human resources in order to promote social cohesion, economic growth and democratic participation as envisaged in the Reconstruction and Development Programme (RDP, 1994). The challenge was thus two pronged, firstly, there was the need to redress the imbalances of *apartheid* education which were manifest in the high levels of adult illiteracy among workers in menial jobs or unemployed, and secondly to build an education system that would respond to the supply and demand imperatives of social and economic development. The RDP was designed as an expansion framework to rebuild a country that had been scarred by years of violence and struggle. Human Resource Development became one of the key programmes of the RDP.

“The underlying approach of these programmes is that education and training should be available to all from the cradle to the grave. The RDP takes a broad view of education and training, seeing it not only as something that happens in schools or colleges, but in all areas of our society - homes, workplaces, public works programmes, women and youth programmes and in the rural areas.”

(RDP, 1994:8)

The Constitution of the Republic of South Africa (1996) 29 (1) states in this regard:

“Everyone has the right to education, including adult basic education; and to further education, which the state through reasonable measures must make progressively available and accessible.”

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<sup>1</sup> Apartheid was the policy of racial segregation and discrimination enforced by white minority governments in South Africa from 1948 to 1994. The chief architect of apartheid was H.F. Verwoerd who entrenched it through the Bantu Education system.

The effectiveness of the Human Resource Development (HRD) programmes is not the subject of this report, suffice it to say that a considerable amount of literature exists on adult education, in particular Adult Basic Education and Training (ABET) and the many challenges it faces.

The overall aim of this study was to attempt to determine whether previously employed African women between the ages of 50 – 59 turned to learning after leaving work. The report focuses on whether retirement triggered transformational learning, thus enabling these near-old women to master their situation and live meaningful lives beyond their years of formal employment.

In their study published in 2003, Hunter and May found that research on older adults had concentrated on the Old Age Pension (OAP) and how it impacted on the quality of lives of the pension recipients. In their paper, “Growing Old Gracefully? Ageing in Post Apartheid South Africa,” Hunter and May (2003) focus on the category that they call, the ‘near-old’ (50-59), which they found was not frequently included in the analysis of the elderly. The study identified a number of themes, risks and vulnerabilities which were faced by the ‘near old.’ These included the risk of unemployment or retrenchment, rising costs of living, which might be exacerbated by economic situations, the possibility of a loss of assets, the impact of being compromised earlier in life stages or risk of earlier investments being threatened and the cost of supporting children until they are independent (Hunter & May, 2003).

In addition, South Africa - like most of the world - is experiencing the phenomenon of an ageing population (Statistics South Africa, 2001; Louw & Louw, 2000). A Statistics South Africa (Stats SA) report entitled “Stages in the Life Cycle of South Africans,” based on the 2001 Census, presented an analysis of census data from a perspective which sought to promote an understanding of the numbers, characteristics and circumstances of life of the population in each life stage. This was prompted by the growing number of older people and the need to understand the role that both government and broader society could play in giving support to ageing people in order for them to live productive lives (Statistics South Africa, Census Report: 2001).

Further, South Africa is a developing country that faces specific major economic and social challenges. This is demonstrated by the high prevalence of poverty, unemployment, HIV & AIDS and crime, especially the abuse of women and children. Vulnerability to these challenges is even higher in rural and poorer areas.

### ***Research Questions***

The key questions underpinning this research were:

- Do African women in the 50-59 age cohort - who were previously long-term employed and are currently retired/unemployed - turn to learning as a life-enriching opportunity post-employment?
- What factors contribute towards retirement being a trigger for learning?
- Can retirement be a catalyst for learning?

### ***Brief History of Apartheid Bantu Education***

The African women who were interviewed were all educated under apartheid's Bantu Education Act of 1953 (No. 47). Bantu education was designed to teach Africans to be "hewers of wood and drawers of water" to benefit a white-run economy and society, regardless of the African's individual abilities and aspirations.

The National Party as the ruling party then viewed segregated education as a key element in their plan. In describing the government's education policy the Minister of Native Affairs at the time, Dr H.F. Verwoerd, stated that:

"There is no place for [the Bantu] in the European community above the level of certain forms of labour... Education must train people in accordance with their opportunities in life, according to the sphere in which they live."

(Clark, Worger & William 2004)

This approach was instrumentalist in nature and was based on Calvinistic National Christian values. It was a tool employed to indoctrinate servitude and maintain the status quo of the

power of the white minority. In this context the teaching methods favoured rote-learning. The post-school career opportunities that were available and open to black people were limited to the nursing, teaching, policing and ministry areas (Clark, Worger & William, 2004). The legacy of Bantu education and its associated underdevelopment can still be felt in South Africa today (Clark & Worger, 2004).

### ***Personal frame of reference***

I, personally, was brought up as a child in apartheid South Africa. I grew up in Soweto in a family of six children. I am the third born. Growing up, my parents always emphasised the value of education. My mother would say: "There is no better husband than your book." She believed that studying was a weapon against poverty that led to food on the table. My parents adhered to the common anthem that if one had a profession it was for life. I believed that, once qualified, I would be a teacher all my life. My socialisation at home mirrored the broadly accepted norms of my community. These were teachings that shaped our life perspectives in relation to race, class and gender.

My ideas were challenged when I became conscious of the socio-political situation in South Africa and the injustices of apartheid. This change of my belief system led me on a course of perspective transformation of previously held beliefs and values which were passively learned through different social institutions - family, church and school all of which reproduced hegemony.

In 1972, as a student at Turfloop,<sup>2</sup> I became an activist and took part in strike action. I maintained an interest in literacy and later, as a teacher, I witnessed the disruption of schools and the breakdown of teaching and learning. I realised that the education crisis would result in illiterate, uneducated adults and that triggered my interest in adult education. In the democratic South Africa, evidence shows that there is still a lot of work to be done to achieve

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<sup>2</sup>The University of the North was established under apartheid to accommodate the ethnic groups of the Sotho, Venda and Shangaan.

the constitutional mandate. I hope that my research results contribute towards discourse, action and advocacy highlighting the value of adult education as a lever for development.

## ***Methodology***

The research was a qualitative study utilising ethnomethodology which is based on the philosophical tradition of phenomenology (Babbie, 2007). Garfinkel (1967), the founder of ethnomethodology, asserts that by recreating and reconstructing life experience, people act like social scientists. The term 'ethnomethodology' means 'method of the people' and the key concepts include indexicality, reflexivity and context.

Indexicality is the way in which actions and statements are related to the social context producing them and the way meanings are shared by participants. These meanings may not be stated explicitly. Reflexivity focuses on the tenet that an object or behaviour and the description of it cannot be separated - rather they have a mirror-like relationship. Participants identify a particular occasion in order to locate the event in the social sphere of reality. Reflexivity, therefore, refers to the way all accounts of a social setting - descriptions, analyses, and criticisms - and the social setting which gives rise to them are interdependent. In this regard context refers to the socio-cultural milieu as well as the economic and political setting within which the participants live.

The participants took part in in-depth interviews and discussion in which they provided details of their work situations and the circumstances that led them to exit their jobs. The interviews were semi-structured with specific questions that guided the process. The interview method was appropriate because it allowed for probing as well as impromptu questioning. It also enabled the researcher to explore emergent themes.

The research focused on attempting to understand how the specified women coped with the situation of being unemployed and whether or not they took up any form of learning thereafter. It further attempted to pinpoint instances of shifting of frames of reference or perspective transformation that acted as a catalyst for change. Thus, it found resonance with the feminist ethos espoused in conducting research.

“One way in which feminist researchers have addressed this problem is through treating the interview as co-constructive. For example, in traditional interview formats the interviewer directs the questioning and takes ownership of the material; in the feminist interview method the woman would recount her experiences in her own words with the interviewer serving only as a guide to the account.”

Green, Bradby, Lee and Eldridge 2009:36

### **Sample**

Mason (1996) asserted that “...sampling and selection - appropriately conceived and executed - are vitally important strategic elements of qualitative research” (Mason 1996:83). If correctly chosen, the sample of participants provides the information which feeds into the data analysis process in order to answer the research questions.

The choice of the sample for this study was influenced by Hunter and May’s (2003) assertion that the near old cohort was vulnerable, the researcher’s own experience and the fact that African women are the most affected by poverty, unemployment and the HIV & AIDS pandemic. The assumption was that transformative adult learning programmes may assist in ensuring that women in this cohort live meaningful lives post-employment.

Literature shows that South Africa is currently experiencing exponential growth in its ageing population, and that this growth is highest among African people. In addition, the growing levels of unemployment among the young population and the growing number of AIDS-related deaths has resulted in an increased number of older adults being burdened with parenting grandchildren and caring for the sick. Adult education can play role in ameliorating this difficult situation.

Tight (1983), citing Habermas, has differentiated three domains of adult learning. The emancipatory area involving interest in self-knowledge and self-reflection, exemplified by the critical social sciences (e.g. psycho-analysis and the critique of ideology) is of interest to this



study which concerned itself with how the five participants could become empowered through perspective transformation and reflection. This could lead to improvements in their conditions of being unemployed.

According to Brookfield (1982) and Freire (1972) the aim of adult education is to liberate people, especially the oppressed. Mezirow (1991) underpins this with his theory of perspective transformation which argues that adults can unlearn the stereotypes that were inculcated in childhood and this can enable them to unleash their potential and creativity to resolve difficult situations.

“Perspective transformation is the emancipatory process of becoming critically aware of how and why the structure of psycho-cultural assumptions has come to constrain the way we see ourselves and our relationships, reconstituting this structure to permit a more inclusive and discriminating integration of experience and acting upon these new understandings. It is the learning process by which adults come to recognise their culturally induced dependency roles and relationships and the reasons for them and take action to overcome them.”

(Tight, 1983:125)

### ***Motivation for the Study***

According to Merriam (1995), the process of designing a research project begins with identifying a particular topic and area of concern. As in most applied fields, such as adult education, this topic may be triggered by a work setting. At the age of 56, I took early retirement after having worked for more than 34 years, mostly in Non Government Organisations (NGOs) and Community Based Organisations (CBOs) where the focus was on the anti-apartheid struggle. The salaries paid were low and pension funds non-existent. After the democratic dispensation I worked in government, however, after twelve years the pension was not adequate to provide sufficient finances for retirement. I wondered if I would have a meaningful life and was anxious about my financial situation. I was not confident enough to

apply for employment because of my age, and the knowledge that preference was given to younger people.

The loss of income and work were real issues to deal with. This experience triggered reflection and I began to wonder how other women in a similar situation were experiencing their life changes and how they coped. I considered this at a macro level using the themes of adult development, ageing and learning. My interest was in emancipatory adult learning through critical reflection and gaining perspectives outside of passively indoctrinated beliefs gained through childhood socialisation.

### **The Value of Employment**

Du Toit (2003) found that although the unemployed suffered from a lack of time structure, variety of social contacts, participation in a collective purpose, and lack of recognised social status and identity; consciously or unconsciously they made efforts to compensate for these shortcomings in their lives. Du Toit also found that unemployed adults experienced greater difficulties in retaining their social identity than did the youth. Louw & Louw (2009) confirm that some professionals continue to work after retirement in order to retain the status that they enjoyed as practicing professionals.

### ***Organisation of the report***

Chapter 2 presents the literature review aimed at providing a conceptual framework for analysing the experiences of newly retired women, aged 50 to 59 years, who were employed for most of their lives. It considers different perspectives of ageing, adult development and learning theories within the context of perspective transformation and resultant transformational learning. It attempted to hone in on indications that meaning schemes (Mezirow, 1991) were shifting and that women were becoming more inclusive and aware or 'conscientised,' (Freire 1972) as they reflected critically on their lives and attempted to cope and make positive changes. It also took cognisance of the fact that the women were part of specific socio-cultural contexts and that their life views had been influenced by politics, gender roles and economics.

Chapter 3 outlines the design of the study employing the qualitative paradigm. This ethnomethodological research has its roots in phenomenology and, is thus interested in how people describe events and draw meaning from these; that is the manner in which they construct meaning and make sense of them. The chapter describes the concepts of indexicality and reflexivity and explains the importance of context in using the methodology. It further outlines the sample and justifies the choice thereof, as well as providing theory to validate the data collection and the interpretive analysis.

Chapter 4 details the findings of this research. The first section outlines the demographic information of the participants; while the second provides particulars about the participants' educational and employment 'herstory.'<sup>3</sup> The third part of the chapter synthesises the participants' interviews and the final portion offers an interpretive analysis of the critical emerging themes.

Chapter 5 reflects on the purpose and rationale of the research project and the extent to which the research questions were answered. It then highlights the central themes that emerged from the conversations and links them back to literature review. The central themes from the study are crisis or not; meaning giving to retirement and retirement as a catalyst for learning. Finally the research design is reviewed with regard to the appropriateness, constraints and possibilities that it allowed. The study provides thoughts/recommendations on how adult learning can best be approached for the 50-59 year age cohort.

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<sup>3</sup> Herstory is a term that was coined in the late 1960s as part of a feminist critique of the term history. The term 'herstory' seeks to emphasise the role of women, and tell the story from a female perspective. The feminist critique asserts that women were written out of history.

## CHAPTER 2: LITERATURE REVIEW

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### *Introduction*

This chapter presents the literature reviewed for the research project and aims to create a theoretical framework that underpins issues of retired African women finding direction and meaning in their lives through further learning as a result of the transition from employment to unemployment. This change in lifestyle brought about by early retirement or resignation, as well as the resultant learning forms the central axis of the study.

The review provides a synopsis of the literature on patterns of ageing, particularly within the South African context, different perspectives on age and ageing, and adult development theories in order to situate the study. Literature on learning theories is then explored in order to accentuate learning for transformation and empowerment. Experiential learning, self-directed learning and transformative learning are discussed in order to gain insights into how adults assess their life situations and reflect upon encounters.

Several theorists such as Kolb (1984), Jarvis (1987, 1992) and Brookfield (1983) draw attention to the significance of experience in adult learning. Brookfield (2005) builds on critical theory to advance the notion of the power of critical thinking in adult learning with Mezirow (1990, 1991) illuminating the significance of experience, reflection, changing past assumptions and building new perspectives in a way that transforms 'why' and 'how' adults know (Mezirow 1990, 1991).

Throughout the literature it is evident that emotions are important in adult learning. This is because feelings are embedded in the life experiences of adults, and, as a result, when individuals assess and reflect on their experiences emotions may be awakened. This process may be painful and difficult, resulting in adults retreating from the change process. The affective dimension, as indicated by Hiemstra (1991) referring to Galbraith (1989, 1990) and Pappas (1990) stresses that in order for the adult learning climate to be conducive it must take into account the psychology of the environment, spatial behaviour, the role of tradition and how these also have an impact on the affective experience. Fellenz & Conti (1989, 1990) stress

the importance of understanding the social environment which may include racism, discrimination, employment and critical thinking.

### ***South Africa's Ageing Population***

Literature on demographic patterns shows that the global population is ageing at an alarming rate. According to Louw & Louw (2009), Hunter and May (2003), the White Paper on Population Development (1998), and Statistics South Africa (2001), South Africa will, in the next decade, experience exponential growth in its ageing population. Ferreira (1998) reports that the pattern of population ageing in South Africa is that of a developing country:

“In 1995, between 5% and 6, 5% of the African, Coloured and Indian population were 60 years and older. At this time, more than a third of the total population aged 60 and over, was in the 60 to 64 year age bracket, which indicates the future exponential growth of the older section of the population, with females more numerous than males in all categories of the elderly.”

(, 2003: 3)

### **Implications of an Ageing Population**

Louw & Louw (2009), Nhongo (2003), United Nations Development Programme (UNDP, 2002), and Statistics South Africa (2003) all attest to the ageing population phenomenon and its implications for the increase in the demand for public services for the aged in the form of pensions, health care and frail care. According to Nhongo (2003), this increase in Africa is taking place in a context wherein society is least prepared for the needs of older people, now, and in the future. Ageing is a complex phenomenon and the nature of age-related problems, the current trend of population ageing, the prevalence of poverty plus the impact of HIV & AIDS pose a new and significant challenge in the care and well-being of older people. These factors will obviously have a significant impact on the quality of life of this cohort.

According to literature, population ageing has become an important development issue and has a number of implications in terms of development priorities and government spending. It is an aspect normally neglected but now requires urgent attention and action. In 1998, the World

Health Organisation (WHO) called for more investment in healthcare and promoting good health throughout the life span in order to ensure that people reach old age capable of contributing positively to society intellectually, spiritually and physically (WHO, 1998: 6).

The ageing phenomenon will also affect the workforce and the skills base of the economy in South Africa at a time when government and business are concerned with a shortage of skills and the negative effect this has on economic growth. The retirement age from formal employment is 65 years for men and 60 years for women. Early retirement may be taken at the age of 55 years. The pensionable age means that this cohort becomes, officially, economically inactive because they are forced to exit the labour market. However, self-employed people are not necessarily affected by the retirement age.

Just as the World Health Organisation (1998) called for more investment in health care for the aged, it would also be prudent to invest in adult learning programmes and projects in order to enable older people to enhance their quality of life as well as continue to be functional members of society. After all, I agree that the purpose of adult education, as espoused by Freire (1972), Mezirow (1991), and Brookfield (2005), is to empower adults to make sense of their social reality and lives in a rapidly changing environment through critical reflection and transformative learning.

Hunter & May's (2003) report claims that studies on the older adult have concentrated on the Old Age Pension (OAP) and the pensioners' quality of life. In "Growing Old Gracefully? Ageing in Post Apartheid South Africa," they focus on the near-old category (50-59 years), a seemingly neglected group; particularly in terms of research. Their study identifies a number of themes, risks and vulnerabilities. These include the risk of unemployment or retrenchment, the rising costs of living which may be exacerbated by the current economic situation - and possibly a loss of assets. The impact of being compromised earlier in life stages or risk of earlier investment being threatened and the cost of looking after children whose parents are infected and affected by HIV & AIDS were also identified.

## ***Ageing in South Africa***

In South Africa, as in most developing countries in Africa, the meaning of the concept of ageing is complex because of the nature of age-related health problems, the current trend of population ageing, the social impact of HIV and AIDS, and the prevailing socio-economic situation. These factors result in accelerated ageing for most, especially African women (Hunter & May, 2003). Hunter and May also identify loss of employment through forced retirement or retrenchment as one of the risk factors in the lives of the near-old category and this may come with a perceived loss of the 'dignity of labour.' However, as illustrated in this study, these changes vary significantly.

Research shows that unemployed people often experience feelings of low self-esteem resulting from their not being involved in activities that are valued by other people (Zunker, 1994). Louw & Louw (2009) have identified a gap in terms of the study of older people from a psychological perspective. Hunter & May (2003) argue that the near-old category is an important unit of analysis. This study, from an adult learning standpoint, was interested in ascertaining the extent to which retirement acted as a trigger or catalyst for learning in the five near-old African women. It also probed whether transformed perspective assisted them to change 'how' they 'know' in order to cope with their altered situation.

## ***The Value of Employment***

The participants in the research project were women who had been long-term employed and are currently unemployed. According to literature, there is value in the ability to work and in being employed and that unemployment may affect self-esteem negatively. Arguably, the worth derived supersedes the ability to draw an income because employment contributes, amongst other factors, to how individuals construct their identity and how they therefore become located, in terms of status and role, within their immediate families and the broader society.

## ***Adult Development and Perspectives on Growing Older***

There are a number of concepts which have been developed in relation to ageing and adult development. The following section deals with the notions of midlife crisis, transition and positive adult development.

### **Midlife as a 'Crisis'**

Introduced by Jacque in 1965, "mid-life crisis" became a popular concept that proposed that people growing older experienced a watershed as they "realise[d] their own mortality and change in time frame from "time since birth" to "time left to live" (Jacque,1965). This period is, according to Jacque characterised by "dramatic self-doubt," resulting from a sense of passing of youth and the imminence of old age. This stage may be triggered by major life events such as death or physical changes. Theorists suggest that it might result in the desire to make "significant changes in core aspects of day-to-day life or situations, such as in a career, marriage, or romantic relationships" (Jacque 1965).

### **Midlife as a transition**

The concept of life transition has been largely used by developmental psychologists who speak about 'life stages' (Levinson, 1978, 1986) and those who address the life events paradigm. Merriam and Caffarella (1991) assert that transitions might be viewed as the natural process of disorientation and reorientation which is normal in the course of life and growth. This process marks the turning point in a path of growth, which involves accelerations and transformations (Merriam & Caffarella, 1991). Lumsden (1985) expounds his theory of 'gains and losses' which come with growing older and to which people react in varying manners (Lumsden 1985).

The focus of this study was to investigate the extent to which the transition to becoming unemployed triggered learning among five participants. Merriam and Caffarella (1991) capture adult transition responses to this shift succinctly:

"It is not unusual to hear someone talk about their 'age-thirty transition,' their mid-life crisis, or their 'biological clock' running out. What has become problematic is separating facts, ideas, and theories about adult development from those popularised by



fictionalised versions of research findings and then linking those findings to learning in adulthood.”

(Merriam & Caffarella, 1991: 96)

They continue:

“Efforts to integrate development and learning have focused on why and how we physically age, our psychological make-up and the major roles transitions play in our lives. There has also been some exploration into how our thinking processes themselves may change in adulthood.”

The concept of transition has been linked to adult learning in order to consider how people cope with changed situations. The learning may result in the acquisition of new skills or areas of interest which may be enriching. Aslanian & Brickell cited by Merriam & Caffarella (1991) found that adults re-assess their lives and come to the realisation that they need new knowledge in order to be able to cope with the change in their lives (Merriam & Caffarella, 1991: 109). Daloz (1986) and Brookfield (1986, 1987) have suggested that adults could be assisted in this change-over through learning courses which could include mentorship programmes (Daloz, 1986).

### ***Theories of Adult Development***

The positive adult development perspective emerged strongly during the 1980s and argues that human development continues beyond the adolescent phase as was suggested by Freud, Piaget and Binet, among others. It further refutes the notion of decline after late adolescence which is postulated by many gerontologists. It derives from several disciplines within psychology. For example, Erickson (1978) labelled adult periods or phases as young adulthood, middle adulthood and late adulthood. Levinson (1978) described a number of “seasons of life” which include childhood and adolescence, early adulthood, middle adulthood and late adulthood each of which has unifying characters, changes and new needs. Maslow (1943) proposed an adult hierarchy which indicates the needs requirements from basic physiological needs to the development of more complex requirements such as social needs and the abstract need for self-actualisation. Piaget in Vuyk (1980) concluded that there were adult post-formal stages;

however, his theory located an end point to the development of cognitive structures in the adolescent's acquisitions of formal operations.

Horn (1970, 1979) found that crystallised intelligence, represented by vocabulary size, for example, increased in adulthood. Kolberg (1984) proposed that, in early adulthood, some people think of moral, ethical and societal issues in multivariate terms. They use multiple relations. During middle adulthood people may become principled reasoners about moral issues and linking right to systems of duties and responsibilities. Armon (1984) found that by middle adulthood, some people could reason about interpersonal relationships at an order of complexity similar to that described by Kolberg.

This study supports the notion of positive adult development because it asserts that older people are capable of engaging in meaningful activities beyond their employment phase and into late adulthood.

### ***Ageing and ageism***

The issue of the ageing phenomenon and its impact on the quality of life of older people, particularly those aged 50-59 years, is an important area for research. Lumsden (1985) defines ageing within the philosophical framework of Bergson's time concepts of time-by-the-clock, which has also been referred to as chronological age (Louw & Louw, 2009) and time-lived. Louw & Louw (2009) promote four views on age, which are used in developmental psychology to study human development. These are, chronological age, psychological age, social age and biological age. According to Lumsden (1985) and Louw & Louw (2009) time-by-the-clock or chronological age is inevitable and occurs as we grow from childhood to adulthood and it brings with it a number of biological changes of growth and development, both physically and psychologically.

Lumsden and others propose that the time span of our preceding life becomes longer, while the years remaining become shorter. Lumsden explains time lived as an encounter with ageing as a qualitative experience of the irreversible movement of life containing gains and losses, anticipation and regret. From the stand point of time-lived, ageing can be described as the

growing probability of losses accompanied by the possibility of growing richness in the quality of experience itself. This last possibility has been recognised and referred to, at times, as 'wisdom' (Erickson, 1978), self-actualisation (Maslow, 1943), individuation (Jung, 1977) and simply happiness (Aristotle).

Erickson (1965, 1968, and 1982) in his psycho-social theory takes social context into account as a critical variable in human development. He defined eight stages of psycho-social development in a life span, which refers to people's progressively emerging emotional needs in interaction with expanding social relationships. Erickson (2009) further highlights that each stage may have developmental tension at critical points in a person's life cycle. Each challenge is resolved in a way that is characteristic of a person's particular experience and social context at that point in life. The person then moves into the next stage of the cycle with capacities that will shape how the new developmental challenge will be resolved (Donald, Lazarus & Lolwana, 2006). Ageing from this perspective is therefore a complex phenomenon that takes place within a socio-cultural, political and economic context affecting the quality of life of the ageing and aged.

Lumsden (1985) stresses that ageing, by nature, comes with a number of gains and losses, which may have a positive or negative impact on the life of a person. "From the standpoint of our present world, aging or human time always involves losses because as biological organisms things we love are destined to perish and disappear," (Lumsden, 1985: 29). These are the losses of youth and novelty which plunge some into a mid-life crisis as they realise their mortality and, perhaps, the approach of retirement when for example one might not have accumulated enough resources.

### ***Conceptualising Adult Development***

Mezirow (1990, 1991) has noted that there is little consensus on a theory of adult development. Erickson (1965, 1968, 1985), Gould (1978) and Levinson (1978, 1986), see the process as a reconfiguration of the self in response to age-related changes in the life cycle. Favell (1982), Kagan (1980), and Kuhn (1983) have questioned whether cognitive development in adults occurs in a stage-like manner (Blanchard-Fields, 1989). They are of the view that there

may be a predictable, orderly sequence of experiences in adulthood rather than inclusive, shared internal or external structures. Still others suggest that changes in behaviour that appear to be developmental are only new responses to a changing context, and they believe that these are responses which have always been available but have never been needed before (Mezirow, 1991).

Adult developmental psychologists have contributed immensely to the understanding of the importance of perspective transformation, which is compatible with positive adult development. Commons (Richards, Commons and Armon, 1984) postulated an ultimate post-formal stage called “cross-paradigmatic operations” in which an adult acquires the capacity to relate perspectives that appear to be independent of one another. Broughton (1977) reported that theoretical consciousness emerges in adulthood. Kitchener and King (1986) identified the developmental steps leading toward adult reflective judgment. Basseches (1984) analysed the uniqueness of dialectical thinking in adulthood (Mezirow, 1991).

In further elaborating on development in adulthood, Labouvie-Vief (1984) explains that the second phase of human development, which is adult development, involves the individual reflecting upon and re-examining social structures, and confronting cultural and symbolic assumptions on which they are based. This process allows the individual to recognise that their way of life may be mere compliance imposed by societal expectations. Mezirow refers to “the reflective adult” who is able to break with past constraints as they discover their own power and autonomy (Mezirow, 1991). Albeit, not all adults reach this higher state of awareness.

### ***Adult Development Theories and their Implications for the Practice of Adult Learning***

Baumgartner (2001) states, and I concur, that adult development theory is important for the practice of adult education and that our philosophy as educators will influence this. She outlines four adult development theories and how these have a bearing on the practice of adult education. For purposes of this study I have focused on the three relevant concepts.

## **The Psychological/Cognitive Approach**

This approach focuses on the individual's internal development processes in interaction with the environment. The psychological, cognitive approach to adult development asserts that humans arrive at more complex, inclusive and integrated levels of development through active participation in their environment. In addition, humans construct knowledge as opposed to responding to existing knowledge. This approach sees adult development as an ongoing journey of discovery, complex in nature and this resonates with transformation (Mezirow), critical (Tennant) and emancipatory (Freire) theories.

Merriam & Caffarella (1991: 107), citing Hutch & Plemons (1979) and Ryff (1980), assert that 'life-events' are markers that give shape and direction to the various aspects of a person's life. Knox (1977) and Brookfield (1987) propose that engaging in learning activities is one way in which adults cope with life events. Knox also points out that change may require adaptation and for some adults the change may produce a heightened readiness to engage in educative activity. The resulting activity may or may not be directly related to the change event and the relationship may or may not be recognised by the individual. Alsatian and Brickell (1980) also found that most adults engage in learning in order to cope with change and concluded that learning was tied to a trigger event.

The psychological/cognitive approach finds favour with adult educators who aim to empower and liberate learners. Adult educators recognise that the learner's receptiveness to learning may be based on their life experience and stage which may prompt a desire to transform. Adults often return to learning as a result of changes/transitions in their lives (Daloz, 1986, 1999). Adult educators watch out for what Havinghurst (1972) calls the 'teachable moments' in which adults are ready to learn and apply a concept because of their life situation. Knowledge is constructed and critical reflection and discussions promoted.

## **The Contextual/Socio-Cultural Approach**

Vygotsky (1978) believed, and I am in agreement, that we cannot be separated from the contexts in which we live and are deeply embedded. They form an integral part of our socio-cultural setting which influences our cognitive development. The social structure - values,

norms and power relations - is very important in terms of how people perceive themselves, what skills they may have, where they live and how they act. Socio-cultural elements such as race, gender, class and sexual orientation all influence adult development. Merriam and Caffarella (1990) affirm this view by quoting Bee who has observed the impact of race and class on the lives of adults.

Dannefer (1984) quoted by Merriam & Caffarella (1990) defines this notion when explaining adult development as a social construct. He outlines three major sociological principles to development: (1) seeing human beings as open and unfinished and thus able to be influenced by the environment; (2) accepting the complexity and diversity of the social environment by levels and classes; and (3) understanding the symbolic nature of the social environment, such as the taken-for-granted ideas about normal development including age-linked stereotypes which are defined by society and the communities in which we interact (Merriam & Caffarella, 1990: 114).

Adult educators adopting this approach may use techniques promoted by Vygotsky such as guided learning. Both adult educator and learner are active participants in the learning process. Learning involves observation, collaboration and scaffolding in which educators adjust the instructional level based on the learner's responses. Skills are culturally relevant and arrived at by thought and action.

Educators thus enable their learners to gain increasingly integrated and higher levels of understanding through critical reflection and discussion. They are also interested in raising awareness about issues of social inequalities arising from the social structure.

### **The Integrated Approach**

This approach is holistic in considering adult development, taking into account the total human being, the intersection of mind, body and soul along with socio-cultural influences as well as how these affect development. Perun and Bilbey (1980), quoted in Baumgartener (2001), proposed an integrated model of development suggesting that the life course is composed of changes on several levels and across time. These alterations may include physical changes,

family changes, alterations in the family cycle such as family structure, responsibilities and roles, changes at work and emotional issues.

Educators who espouse the integrated approach promote the growth of learners intellectually, physically, aesthetically and spiritually and are sensitive to the notion of multiple intelligence theory.

These varied approaches reflect the different lenses through which adult educators view development and how they then attempt to achieve praxis in adult education and learning or facilitation. For purposes of this study, the theoretical underpinning that was adopted was a combination of the latter three approaches, i.e. an integrated approach which resonates with the goal of enabling near-old participants to transform their perspective through critical reflection, discussion and action.

## ***LEARNING THEORIES***

### **Self-Directed Learning**

Literature shows that self-directed learning, one of the five principles of Knowles' (1972) andragogy, became a concept that evolved over time and reflects the shifting paradigms that have informed its development. In this regard, Brockett and Hiemstra (1991) refer to the "evolving perspective of self-directed learning, because individuals differ, times change and so do dominant paradigms," (Brockett and Hiemstra, 1991: 21).

As a starting point, Knowles (1975) assumed that adult learners were self-directed. Tough, building on the work of Houle (1961), provided a comprehensive description of self-directed learning in which the basic premise was that adults learn every day, whether in a formal setting or informally (Merriam, 2001). Merriam (2001) makes the observation that early studies were descriptive, verifying the widespread presence of self-directed learning among adults and documenting the processes by which it occurred. Merriam observes that debates on adult education theory are ever current and stresses that today the focus is on the work of model-building, discussion of goals and the ethics of self-directed learning (Merriam, 2001).

Also relevant is that self-directed learning has evolved from mechanistic, linear diagnosis models to the current, more interactive models that take into account socio-cultural milieu, history and relationships. Merriam and Caffarella (1991) provide categories of the goals of self-directed learning, namely, that it is rooted in humanistic philosophy and fosters transformational and emancipatory learning.

Brockett and Hiemstra (1991) advocate the notion of looking at self-directed learning from the perspective of life-long learning. Their view is that life-long learning is not the preserve of formal education but that learning takes place across the life span of a human being. They further cite the studies of Mocker and Spear (1982) who identify four forms of learning across different spectra such as formal, non-formal, informal and self directed. In this context, Brookfield (1985) posits that self-directed learning:

- (a) enables individual learners to become empowered to take increasingly more responsibility for various decisions associated with the learning endeavour;
- (b) is best viewed as a continuum or characteristic that exists to some degree in every person and learning situation;
- (c) does not necessarily mean all learning will take place in isolation;
- (d) results in learners appearing able to transfer learning, in terms of both knowledge and skill, from one situation to another;
- (e) can involve various activities and resources, such as self-guided reading, participation in study groups, internships, electronic dialogues and reflective writing activities (Brockett & Hiemstra, 1991: 21).

Tight (1983) locates self-directed learning within the ambit of perspective transformation. In this regard he is supported by Kidd as cited by Brockett and Hiemstra:

“It has often been said that the purpose of adult education or any kind of education, is to make a person a continuing inner directed self-operating learner.”

(Brockett and Hiemstra, 1991: 19)



Kasworm (1983), as referred to by Brockett and Hiemstra, states that self-directed learning can be viewed “as a set of generic finite behaviours, as a belief system reflecting and evolving from a process of self-initiated learning activity, or as an ideal state of a mature self actualised learner” (Brockett and Hiemstra, 1991: 21). Fellenz differentiates between two aspects of self directed learning:

“Either as a role adapted during the process of learning or as a psychological state attained by an individual in their personal development. Both factors can be viewed as developmental abilities and hence analysed both as to how they affect the self-directed learning effort.”

(Brockett and Hiemstra, 1991: 21)

In developing the link between self-directed learning and personal development, Fellenz draws from concepts such as inner directedness (Riesman, 1950), self-actualisation (Maslow, 1954) locus of control (Rotter, 1966) and autonomy (Erickson, 1964).

## **Experiential Learning**

Key (2002) like most theorists, asserts that experiential learning has become a central idea “even a new orthodoxy in current thinking about adult learning” that may be defined “as the process of creating and forming experience into knowledge, skills, attitudes, values, emotions, beliefs and senses. It is the process through which individuals become themselves” (Key, 2002: 9). She continues, citing Kelly (1997) that “the heart of all learning lies in the way we process experience, in particular, our critical reflection of experience.” Indeed, Knowles (1972) identified adults’ reservoirs of experience which they may possibly use as a resource for learning and correctly asserts that experience is the adult learners’ living textbook (Conner, 1997).

According to Kolb (1984) experience is a vital resource for learning and development. The theory emphasises the centrality of experience in the learning process. It attempts to give a holistic and integrative perspective to learning that combines experience, perception, cognition and behaviour (Kolb, 1984). Concrete experience is the basis for observation and reflection.

Observations are digested and absorbed into an idea from which new implications for action may be deduced. These implications serve as guides acting to create new experiences (Kolb and Lewis, 1984).

Brookfield (1983) describes adult learning as ubiquitous occurring throughout an adult's developmental stages in a variety of settings which may either be formal or informal. He also holds the view that the pervasive nature of adult learning may justifiably invoke the term life-long learning to describe an empirical reality rather than summarising an adult education philosophy or representing a political strategy (Brookfield, 1983).

### **Criticism of Experiential Learning Theory**

Even though experiential learning is accepted as a legitimate notion for the practice of adult learning it has come under criticism from certain theorists. Jarvis highlights that experiential learning does not necessarily change the person.

“However all learning does not automatically result in growth, and some learning experiences result in the curtailment of the potential to grow, so that it has been recognised that people are to a great extent what they have learned.”

(Jarvis, 1987: 199)

He further states that educators or facilitators of adult learning programmes should be conscious of this point and attempt to create learning environments in which an adult can truly learn (Jarvis, 1987). However, life is not linear and predictable and it is when there is a trigger or a catalyst that we then have to reflect and take action. There are instances that might require new thinking (Jarvis, 1992).

Rogers as cited by Key (2002: 12) points out that “learning includes goals, purpose, intentions, choice and decision making and it is not clear where these elements fit in the learning cycle.” That experience does not necessarily stock a learning reservoir (Knowles, 1972) is also a possible argument. Mezirow (1991) points out that experience should not be thought of as an objectively neutral phenomenon. He continues that as humans we construct our experience.

What happens to us and to our world is a function of the structures of understanding and perceptual filters which are culturally embedded to the extent that we are unaware of their existence (Mezirow, 1991).

Notwithstanding the criticism, Kolb's contributions are widely recognised and acknowledged because his model of experiential learning has been influential in developing theoretical work among researchers of adult learning. He significantly shifted educational thought from the locus of the instructor back to the learner. Experiential learning theory continues to develop in current discourse about adult education and learning.

Usher and Edwards, as cited by Brookfield (1991), caution that experience may be used to bolster the control of those in power. They give the example of post-modern education and accreditation of prior knowledge and experience which had originally emerged as a counter-cultural experimental practice (Brookfield 2005). While this recognition of prior learning was rejected in some circles, it was eventually accepted and manipulated to entrench the hegemony of the powerful.

I am of the view that experiential learning is of particular significance to adults, especially within the South African context. In this country there is a real need to reflect on our experiences on an on-going basis in order to be able to cope in a rapidly changing environment (Hunter & May, 2003).

### ***Mezirow's Transformational Learning***

Mezirow's theory was a result of his own experience of perspective transformation in his career working with adult learners and communities. He realised that his approach lacked the critical dimension of Freire's conscientisation,

“The process by which adults achieve a deepening awareness of both the socio-cultural reality which shapes their lives and their capacity to transform that reality through action upon it.”

(Mezirow 1990: 1)

## **Transformative Learning**

Mezirow (1990, 1991) defines transformative learning as a process of making new or revised interpretation of the meaning of an experience which guides subsequent understanding, appreciation and action. Adults acquire a coherent body of experience - associations, concepts, values, feelings and conditioned responses - both through formative learning and socialisation during childhood. This learning may be informal or tacit learning from parents, relatives and significant others as well as through our schooling. Although we may be encouraged to be self-directed in our learning as we mature, normative learning in a particular culture and idiosyncratic requirements are most often rewarded because we are expected to conform to the required rules of general society. What we see or fail to see, or what we think or fail to think, are strongly influenced by “habits of expectation that constitute our frame of reference,” (Mezirow, 1990: 1). This frame of reference is a set of assumptions that structure our way of thinking and how we interpret our experiences and make meaning.

Mezirow’s central argument in transformational theory is that the individual acquires a frame of reference through which meaning is construed and all learning that takes place may be changed when the acquired habits of expectation are transformed as a result of a trigger.

## **Meaning schemes**

Meaning schemes are described as habitual, implicit rules for interpreting our reality. They are sets of related patterns of expectations directing cause-effect and category relationships as well as event sequences. All of these are every-day taken for granted matters (Mezirow, 1990: 2).

## **Meaning perspectives**

Meaning perspectives refer to the structure of assumptions in which new knowledge is assimilated and transformed by past experience during the process of interpretation. This process involves the application of “habits of expectation to objects and/or events to form an interpretation,” (Mezirow, 1990: 2).

Meaning schemes and perspectives constitute the “boundary structures” for perceiving and comprehending new data. In this process, Mezirow emphasises the importance of experience

as a lever for refocusing and extending expectations about how things ought to be. He further highlights the significance of reflection on previously held assumptions in order to overcome modes of perception which are limited and distorted as well as arbitrary selective modes of perception and cognition. In this regard, Mezirow concludes that the ability to assess and adjust meaning schemes and perspective is central to adult development.

### **Cultural Context**

Mezirow further emphasises cultural context as central to adult learning. He cites Bower (1984) who contends that, through socialisation, the individual's subjective self is built up in a biographically unique way and serves as a set of rules that govern the interpretation for making sense of everyday life. This is a view also held by stage theorist such as Erickson and Levinson. Educationists such as Baumgartener (2001) and Merriam & Caffarella (1991) also emphasise the importance of the socio-cultural context on adult learning, development, and how individuals interpret their world and reality.

Much of the social world of everyday life is learned and experienced as the inevitable order of reality. Transformative learning enables adults to 'name' reality, to 'see' what was previously taken for granted in order to speak with our own voice, and negotiate meanings, purposes and values critically, reflectively and rationally rather than passively. By reflecting upon experience, an adult can change their previous perception and migrate to a more accepting frame of mind.

### **Triggers for Perspective Transformation**

Mezirow and other theorists contend that anomalies and dilemmas in which old ways of knowing cannot make sense may become a catalyst that precipitates critical reflection and transformation (Mezirow, 1990). Perspective transformation may also be triggered in response to an externally imposed, disorienting dilemma, such as divorce, death of a loved one or change in job status. The disorientating dilemma might be the result of observation, discussion, a book or a workshop that activated questioning and challenging of ingrained presuppositions, beliefs and perspectives.

Mezirow stresses that transformative learning usually occurs in a problem-solving situation. He further cites Dewey and James who also see the place and space of problem solving as the context of learning resonating with Brookfield's (1987) assertion that learning is ubiquitous and often taken for granted. To Mezirow transformative learners are able to move toward a frame of reference that is more inclusive, discriminating, self-reflective, and integrative of experience. It is not so much what happens to people but rather, how they interpret and explain it that determines their actions, hopes, contentment and emotional well-being as well their quality of life.

“Much learning in adulthood results from adding knowledge to an already existing base - we build on what we know. Through transformative learning we change how we know because it causes us to rethink our frames of reference and arrive at new perspectives.”

(Key, 2002: 16).

From research into re-entry of women into college Tight and Mezirow (1983) identified the following elements which led to perspective transformation (1) a disorienting dilemma; (2) self examination; (3) a critical assessment of personally internalised role assumptions and a sense of alienation from traditional social expectations; (4) relating one's alienation and discontent to similar experiences of others and recognising that they were not alone in that situation; (5) exploring new ways of action; (6) building competence and confidence for new roles; and (7) acquiring knowledge and skills.

### **Instrumental, Communicative and Emancipatory Learning**

Key (2002) citing Mezirow distinguishes between three types of learning in an effort to arrive at universal and comprehensive theory. Instrumental learning is largely concerned with mastering the ability to control and manipulate things, people and situations and is largely mechanistic in approach. “Essentially it involves the method of problem-solving, canonised by the natural sciences, that we all use or misuse in learning how to do things,” (Key, 2002: 17).

Communicative Learning involves gaining an understanding, through language and communication, about the meaning of what others communicate about. It is concerned with

the presentation of values, norms, ideals, freedom, justice and transparency, democracy and peace. The implications of what is communicated will pertain to norm-governed concepts, judgements, propositions, opinions, beliefs or feelings. Determining the conditions under which such assertions are valid requires a two-dimensional assessment which includes a review of the assertion. In addition, it necessitates a critique of the relevant social norms and cultural codes that determine the power-relations over the parties involved (Mezirow 1991: 8).

“...[C]ommunicative learning is dialogue or conversation. It is through communicative acts that we understand and transform the reality in which we live.”

(Key, 2002: 17).

Key cites Wildemeersch (1989) who warns that “experiential learning must recognise the critical importance of conversation and dialogue as a basic element of human learning.” This is a caution against some of the current orientation in experiential learning which tends to emphasise self-direction and individualised learning at the expense of concerns such as communication and how dominant ideologies mediate the way in which we interpret experience (Key, 2002: 17).

### **Emancipatory Learning**

Tight (1983) likens emancipatory learning to perspective transformation. Key (2002) sees emancipatory learning as a process of critical self-reflection which may result in identifying distorted meaning perspectives, and challenging and transforming them through a process of critical reflection. This domain of learning involves self-knowledge and self-reflection through various means such as critique of ideology or ideology critique (Mezirow, 1990 and Brookfield, 2005).

Mezirow states that, for adults to be liberated, they must, of necessity, be able to do ‘ideology critique’ which he sees as being equal to ‘systemic’ critical reflection which focuses on probing socio-cultural distortions and inequalities (Mezirow, 1991: 13). Central to this theory is the ability to reflect critically on meaning schemes acquired in childhood through socialisation or trauma.

Mezirow (1991) emphasises the importance of the emancipatory process of becoming critically aware of why or how the structure of psycho-cultural assumptions has come to constrain how we perceive ourselves and our relationships and how we construct our social reality. The emancipatory domain of learning goes beyond the individual and grapples with structural issues, hegemony, and how these oppress and subjugate the less powerful. The quest for empowerment, freedom and emancipation is the ultimate goal of emancipatory education.

### **Structuring Meaning**

According to Mezirow, making meaning is central to learning, growing and developing. In this context, learning requires that we interpret and use previous meaning schemes to guide how we think, act and feel about a current experience. An important aspect of making meaning is critical reflection which helps us to scrutinise the presuppositions on which a previous belief was founded and adjust distortions in our interpretations.

As humans we are shaped by our socialisation and orientation through which we construct our meaning schemes which in turn inform our perspectives. Life perspective, similar to world view, is the lens through which we interpret and understand our world. Thus, it is through ongoing critical reflection on our meaning schemes and life perspectives that we are able to adapt in a changing world.

### **Three Codes Shaping Meaning Perspectives**

Mezirow identifies three well defined codes of meaning perspective which are critical for understanding our experience. These codes help us construct, deconstruct, reconstruct and interpret our experiences as well as make meaning of them. Key (2002), citing Brookfield, notes that “[i]n the domain of transformative learning, the learner sets out to examine the assumptions and explore the causes (biographical, historical and cultural), the nature (including moral and ethical dimensions), and the consequences (individual and interpersonal) of their frame of reference to ascertain why they are predisposed to learn in a certain way or appropriate particular goals,” (Key, 2002: 19). Epistemic codes govern how we structure and assess knowledge. They include our preferred learning styles which may either be abstract or concrete. Socio-linguistic codes consist of norms, value systems, culture and tradition. They



include all the social structures that may have influenced our socialisation and thereby our assumptions and meaning perspectives.

Psychological codes are the personality traits, self-concept, identity, inhibitions and neurotic make up which have developed as we grew up. These psychological codes are further influenced by the socio-cultural milieu of our socialisation and upbringing.

### **Critical Reflection**

Critical reflection involves a critique of the presuppositions on which our beliefs are built (Mezirow 1990, 1991). It is the process of analysing, reconsidering and questioning experiences within a broad context of issues (e.g. issues related to human rights, social justice, ageing and learning, culture and traditions, and politics).

To make meaning requires reflection and interpretation of experiences and events thereby making sense of them. When we subsequently use this interpretation to guide decision making or action then making meaning becomes learning. According to Mezirow (1991) reflection is a higher level of thinking and a higher order of mental processing. Mezirow cites Boud, Keogh and Walker (1985) who refer to reflection as “a generic term for those intellectual and affective activities in which individuals engage to explore their new experiences in order to lead to new understanding and appreciation,” (Mezirow, 1990: 146). Dewey, as cited by Mezirow, defines reflection as “assessing the grounds of one’s beliefs, the process of rationally examining the assumptions by which we have been justifying our convictions.”

### **Brookfield on Critical Reflection**

Brookfield asserts that critical reflection is probably the idea of the twenty first century for many adult educators who have long been searching for a form and process of learning that could be claimed to be distinctively adult. Evidence that adults are capable of this kind of learning can be found in developmental psychology, where a host of constructs such as embedded logic, dialectical thinking, working intelligence, reflective judgment, post-formal reasoning and epistemic cognition describe how adults come to think contextually and critically

(Brookfield, 1987, 1991). Brookfield notes that, as an idea, critical reflection focuses on three interrelated processes;

- (1) the process by which adults assess, question and then reframe an assumption that up to that point has been uncritically accepted as representing commonsense wisdom;
- (2) the process through which adults adopt alternative perspectives on previously taken-for-granted ideas, actions, forms of reasoning and ideologies, and
- (3) the process by which adults come to recognise the hegemonic aspects of dominant cultural values and to understand how self-evident renderings of the 'natural' state of the world actually bolster the power and self-interest of unrepresentative minorities.

Tight (1983) elaborates on critical theory explaining that adults may experience certain anomalies as they grow in adulthood. These disorientating dilemmas may be resolved by becoming critically aware and conscious of how and why our way of perception, thought and action have distorted the manner in which we have defined the problem and ourselves in relation to it. This process of awareness-raising is what Freire (1972) refers to as conscientisation.

The process of problem-posing entails problematising the taken-for-granted social roles, expectations and the habitual ways we act as well as feel in carrying them out.

Tight (1983), explains that the tendency to move towards new perspectives which appear more inclusive, discriminating and integrative of experience in attempting to resolve dilemmas may be consistent with the human quest for meaning and better understanding of the self and our world.

### ***Dialectical Thinking***

According to Mezirow (1990, 1991), learning is a dialectical process of interpretation through which we interact with objects and events guided by our old set of expectations. Brookfield elaborates that in dialectical thinking the chance to explore the contradictions and discrepancies between the general and the particular should be regarded as an opportunity for

personal development. It should not be regarded as a depressing and confusing (crisis) reality of adulthood (Brookfield, 2000).

Dialectical thinking refers to the ability to view issues from multiple perspectives and to arrive at the most economical and reasonable reconciliation of seemingly contradictory information and postures. It is also a form of analytical reasoning that pursues knowledge and truth as long as there are questions and conflicts. The acceptance or acknowledgment by an individual in regards to understanding that their thought processes may conflict, based upon a given situation, is an opportunity to exemplify dialectical thinking (Brookfield, 2000).

Candy (1989,) as cited by Mezirow identifies a number of assumptions related to dialectical thinking. Individuals participate in the construction of reality in which context is important. Accepted categories are socially constructed and human interactions are based on complex roles which are derived implicitly from socially accepted rules. Transformational learning theory is therefore concerned with how adults adapt or transform their perspectives in order to be able to cope in a changed situation.

### ***Hegemony***

At the centre of critical theory, is the concept of hegemony, which explains the way in which ideas are reproduced and accepted through education. In this regard, Freire (1972) describes the domesticating nature of education which serves to entrench the repressive culture of the dominant class (1972). Gramsci, as cited by Burke (1999), asserts that people learn and assimilate the leading values, ideas and practices through the education system and other cultural institutions which reinforce the status quo. Brookfield (1990) asserts that, as education perpetuates domination, hegemony must be understood as an educational phenomenon. Indeed in South Africa, before democracy, Bantu Education was designed to maintain apartheid hegemony.

### ***Conscientisation***

It is through conscientisation that humans become aware of what perpetuates oppressive ideologies, habits of perception and psychological distortions. Adult educators who believe that

education, of necessity, must free adults from oppression need to employ methods which help to raise awareness and conscientise individuals about how they can free themselves from dependency and domination.

Freire (1972) insists that education is not, and cannot be neutral. It often serves as an instrument of domestication/oppression which uses a banking method whereby the teacher is the authority and the adult learner is an empty vessel into which information is deposited. Education can, however, be an instrument of human liberation: 'it is cultural action for freedom' whereby persons collectively pursue and affirm their subject-hood.

According to Freire, human beings have an 'ontological vocation' - a given destiny and a particular life mission to fulfil. This quest is to become beings with a consciousness, 'beings of praxis' who are humanised in dialogue and have a history. In South Africa, Freire's method was used extensively among Non-Governmental Organisations, churches, student organisations and unions to 'conscientise' people about the evils of apartheid and the need to act against it (Aitchison, 2000.)

## ***Conclusion***

In this review I have probed patterns of ageing in the South African context and considered different perspectives on age and ageing with a particular focus on why the near-old cohort is a deserving research target group. Adult development theories including life stage theories and models about crisis and transition were set out and these will be utilised as frameworks to unpack and interpret the research participants' experiences in order to ascertain if leaving formal employment triggered learning.

Adult development theories provide lens and propose approaches that have implications for adult learning particularly for those in the near-old age group. Hopefully, instances of what is proposed by other researchers and theorists will become apparent in the participants' personal herstories; in an attempt to arrive at a degree of praxis.

The literature review has presented varied notions around experiential and self-directed learning and this will be used as a framework to critically assess learning in the 50-59 year old African women who comprised the research sample. Much effort is expended on setting out Mezirow's transformative learning theory that attempts to explain how adults assess their life situations and reflect upon encounters in order to make sense of, and cope with changed situation.

The literature review demonstrated the fundamental importance of experience in the process of adult learning. It also highlighted the need to challenge socialisation in order to accommodate more complex perspectives beyond those passively inculcated by our families and communities. Theory makes researchers aware of mechanisms that we can target in order to encourage learners to challenge conventional meaning schemes and perspectives. Mezirow's theory of perspective transformation provides a very useful analytical tool to allow adult educators to consider how to promote reflection on, and interpretation of, situations from different angles so that the resultant action leads to emancipation from oppression.

Chapter 3 outlines the design of the research study, situated in the qualitative paradigm and employing ethnomethodology. The method is premised on phenomenology. The sample of five, African near-old women is justified. Theory is provided to validate data collection methods that include in-depth interviews that adopt a feminist stance. The interpretive analysis is also considered in terms of how to deconstruct the conversational text and extract emerging themes looking for patterns such as similarities and differences in the various categories. Ethical obligations, critical elements of research are also discussed.

## CHAPTER 3: RESEARCH DESIGN

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### ***Introduction***

This chapter outlines the research design, which is essentially the strategy that the researcher adheres to in order to manage the project. Maxwell emphasises the fundamental importance of a solid plan which he describes as follows:

“A good design, one in which the components work harmoniously together, promotes efficient and successful functioning; a flawed design leads to poor operation and failure.”

(Maxwell, 1996: 2)

The components that he refers to, which are generally accepted in research design, include the purpose; the conceptual context, research questions, methods and ethics. The research plan in the qualitative paradigm is an iterative process that involves moving between these different parts of the plan in what Maxwell citing Geertz (1976) calls ‘tacking’ back and forth. Underpinning the research design is the philosophy of the researcher.

This chapter begins by restating the aims of the research, then provides the philosophy of the researcher and suggests how that informed the research design in terms of the choice of methodology, sample, data collection, recording and analysis as well as the ethical considerations. The chapter sets out accepted research practices in the field of adult education in order to be reliable and accurate.

### ***Restating the aims of the research***

The aim of the study was to examine whether African women in the 50-59 year age cohort - who were previously long-term employed and are currently retired or unemployed - turned to learning post-employment and to what extent the cessation of work acted as a catalyst to this learning. Instances of disruption that resulted in significant lifestyle change may have triggered learning and of interest was how participants coped with the loss of employment and income.

The African women in this age cohort grew up in the apartheid era characterised by inequality and limited opportunity along racially segregated lines. Having experienced premature termination of my own employment at the age of 56 my assumption was that, like me, these women would be feeling lost and adrift, due to the fact that they no longer had a sense of purpose. The work ethos was inculcated in many and the value of having a steady income acknowledged. I considered feelings of discordance and being misplaced as directly applicable to Mezirow's transformative learning theory. This has, as its aim, the facilitation of transformation through a process of assessing meaning schemes and perspectives in order to arrive at decisions which one to take control of one's life and make sense of the world.

### **Philosophical approach to education and research**

Philosophies are entrenched values and belief systems that influence our perspective about the world, knowledge and social reality (Hiemstra, 1988). Philosophies, therefore, play a critical role in how we perceive ourselves and others and are deeply rooted in individuals and groups/communities. It takes conscious effort to assess and understand these value systems and their influence on our perspectives. Meaning schemes and meaning perspectives form the premise of Mezirow's transformative dimensions of adult learning (1991) and this has specific implications for adult education and research.

Different schools of thought have evolved from conservative, mechanical approaches to progressive views on education and research which promote human development and growth. Merriam and (1991) have noted that adult education theory is currently rooted in humanistic philosophy and fosters transformational and emancipatory learning. Baumgartner (2001) stresses that adult development theory is important for the practice of adult education and that our philosophy as educators influences this. Freire (1972) asserts that philosophy is a product of our ontological and epistemological assumptions which affects our methodological considerations in both practice and research in education.

Personally, my philosophy has evolved over the years from my student days as an activist at the University of the North in 1972 where we were exposed to writings of eminent emancipatory

education theorists such as Freire (1972) and Gramsci (1935). With development, my philosophy became more eclectic and includes elements of radicalism, progressivism and humanism. Knowledge should be empowering, therefore, the process of gathering knowledge must be enabling. In this regard Lather (1986) cites Gramsci who fifty years ago urged intellectuals to promote “a praxis of the present” (Lather; 1986:257) by helping to develop progressive groups who are conscious of their own actions and situations in the world. What she was elaborating on was the dominating power relations between the researcher and the researched and advocates for the democratisation of the research process.

“An emancipatory social research calls for empowering approaches to research whereby both researcher and researched become in the world of feminists...the changer and the changed.’

(Lather; 1986:263)

I believe in the innate goodness of humans and that all of us have potential which is realised in accordance with opportunities, access and resources. I believe that everybody has the right to dignity, freedom and autonomy. The purpose of education should therefore be to facilitate perspective transformation in order to enable access to alternative perspectives in order to understand situations and arrive at meaning in one’s life (Tight, 1986: 136).

In accordance with Hiemstra, philosophy should evolve with the age and situation at a particular point in an individual’s history. This means that as people mature and develop, they should constantly evolve their philosophy based on what they have experienced and learnt. As I matured I came to believe in the power of transformative knowledge as espoused by Hope and Timmel:



“Transformative knowledge is formed through the interaction of social and scientific knowledge, as people together struggle to deepen their knowledge and change their situation. This is the type of knowledge that is needed within a whole community if they are to become the subjects of their own history (to transform their lives, communities and their world).

(Hope & Timmel, 1988: 14)

Philosophy is a critical aspect in adult education because it provides a set of values, beliefs and principles which underpin the decisions that are made about education (Hiemstra, 1988). Our philosophical approach is reflected in our view of the learner; the role of the teacher/educator/facilitator; the learner/facilitator relationship and how we facilitate learning.

“Philosophers of every age have offered an explanation of freedom and determinism, individual and societal rights, good and evil, and truth and falsehood” (Hiemstra, 1988:179). Hiemstra outlines four reasons why an adult educator should have philosophy of education:

- (1) A philosophy promotes an understanding of human relationships;
- (2) It sensitises one to the various needs associated with positive human interactions;
- (3) It provides a framework for distinguishing, separating and understanding personal values;
- (4) It promotes flexibility and consistency in working with adult learners;
- (5) Merriam (1982) notes that philosophy can inform policy decisions and guide administrators, teachers and councillors in their everyday practice.

### **Tension between philosophy and practice**

As an educator I have experienced disparity between philosophy and practice. The reasons are multi-faceted and range from institutions holding a different philosophy and following specific curricula, to methods and learning environments which may not be consistent with one’s own approach to practice. Tension may also be a result of disagreement between people about approaches that are influenced by race, class, gender ideas, and cultural norms. Institutions

have specific agendas which may be political or reliant on funding. Management structures may impose approaches that are prescriptive and in conflict with those of teachers.

Hiemstra notes that being able to state a philosophy does not necessarily mean that it is easy to translate that into action. Cunningham (1982), as cited by Hiemstra, describes contradictory and inconsistent views that may be held by an adult educator:

“It is not problematic that inconsistencies occur when a thoughtfully conceived system of values is put into practice. What is worrisome is that continuing educators develop and operate programmes without a clearly visualised set of values in which the adult learner and societal wellbeing are central concerns.”

(Hiemstra 1985: 180)

### ***The Ethnomethodological Approach***

This research situated itself firmly within the qualitative paradigm and was essentially an ethnomethodological study with its roots in phenomenology. The qualitative paradigm promotes an understanding of the knowledge of the world as interconnected - a departure from the positivist paradigm (Maxwell, 1996). Phenomenology is interested with how people define events to draw meaning in their lives; that is how they make sense of them. It seeks to probe and understand how informants perceive the world and describe the underlying patterns.

The decision to select the topic, design and its ontological and epistemological foundations is the result of multiple considerations, which are themselves oscillatory and often-times contradictory. Reasons for this have to do with the multifarious theories and practices available within the field of social research. This is shown by Cohen, Manion and Morrison (2000) when they state that “knowledge and definitions of knowledge reflect the interests of the community of scholars who operate in particular paradigms,” (Cohen, et al, 2000: 29). This process is critical as it allows for the framing of the study within a particular paradigm that enables analysis and the extraction of meaning.

The underlying ontological assumption of this study is that it is primarily constructivist in nature. This is because “a constructivist ontology entails the assumption that social reality is produced and reproduced by social actors, it is a pre-interpreted, inter-subjective world of cultural objects, meanings and social institutions” (Blaikie 1993: 202). At the same time its epistemological foundation is one of interpretivism in which knowledge of the social world can be achieved by immersion in some part of it. Interpretivism, understood in this context, is also consistent with feminist theory which analyses the subjugation and empowerment of women in society. Therefore, the ontological view is that people are actors of the social world, but they are also acted upon by various forces and contexts, whether they realise this or not.

The above stated epistemological vantage is consistent with an ethnomethodological approach in as far as it seeks to describe and explore the near-old women’s production of their social reality in terms of their portrayal and perceptions of retirement and learning. This links with what Garfinkel, in Babbie (2007), describes as “people continuously creating social structure through their actions and interactions, and their own reality” (Babbie, 2007: 36). Garfinkel suggests that everyone is acting like a social scientist, hence the term ethnomethodology, which means “methodology of the people” *ibid*.

### **Why Ethnomethodology?**

The research problem was multi-dimensional, cutting across the fields of psychology, sociology and adult learning. The purpose of the research was to explore and describe five women’s experiences of job loss and consider if this situation triggered learning. It attempted to locate instances of what is described in Mezirow’s theoretical framework of perspective transformation (1992). Thus, ethnomethodology was the best approach as it enabled engagement with the participants who were encouraged to detail the meanings that they ascribed to the issues that affected them. Through this method, the often-taken-for-granted and underlying patterns of these situations emerged and were recorded.

Descriptions of the 50-59 year old women as the key participants - were interpreted and analysed, thus aiming to provide knowledge about participants’ social order, namely, the

assumptions they made, the conventions they utilised and the practices they adopted in their lives (Cohen, Manion & Morrison, 2000).

### **Applying Ethnomethodology**

Literature shows that ethnomethodology does not prescribe a formal set of research methods, and that, as a result, ethnomethodologists use a variety of methods in conducting their studies. However, what is important is the understanding of the key concepts of indexicality and reflexivity, and the application of these guidelines within the study.

Indexicality requires locating an incident in a meaningful individual context; Garfinkel uses indexicality and indexical expression to refer to the dependence on context of the meaning of an object, social practice and concept (Baert, 1998: 86). Reflexivity requires that the researcher understands that ordinary people carry out social actions according to their largely practical interpretations of meaning about who and what is around them. This is known as reflexivity of accounts. Feminists use the technique of reflexivity and consciousness-raising, especially when dealing with women who have experienced, inter alia, divorce, unemployment and rape (Fonow & Cook, 1991).

Furthermore, important to ethnomethodology is the capturing of how research participants described, understood and acted upon their social reality.

### ***The Sample***

The sample comprised of five, previously professional African women between the ages of 50 to 59 years, who had lost their jobs. The main reason for choosing women as the participants in the study had to do with the researcher's personal experience that prompted her to consider issues of adult development, ageing and learning. During this critical period of reflection and reading she came across Hunter and May's (2003) paper entitled "Growing gracefully in *post-apartheid* South Africa," in which the authors identified the 50-59 age cohort as "near-old" and an important study area.

### ***In-depth Feminist Interviews***

The research project had at its core the understanding of how specific women coped with the situation of becoming unemployed and retired, and whether they took up further learning. Key to that was seeking to unearth knowledge about how and why the transition occurred and to share that information with other women where possible. In that way, the research approach resonated with the feminist ethos espoused for conducting research. This is illustrated by Green, Bradby, Lee and Eldridge (2000) who state:

“One way in which feminist researchers have addressed this problem is through treating the interview as co-constructive. For example, in traditional interview formats the interviewer directs the questioning and takes ownership of the material; in the feminist interview method the woman would recount her experiences in her own words with the interviewer serving only as a guide to the account.”

Green, Bradby, Lee and Eldridge 2009:36

The above statement applies the key elements of an ethnomethodological study, of indexicality and reflexivity. Feminist analysis also seeks to unearth knowledge about power relationships and gender within specific political, cultural and moral systems and structures with the ultimate dual goals of illustrating constructed inequalities therein. By conscientising women and offering them positive alternatives they can be empowered.

Green et al (2000) state that

“the feminist interview method encourages and promotes a more reflexive and reciprocal approach and seeks to neutralise the hierarchical, exploitative power relations that were claimed to be inherent in the more traditional interview structure.”

Green, Bradby, Lee and Eldridge 2009:36

Taking this further, Oakley (1981) argues that finding out about people through the interview method is most successful when the researcher can, and is willing to invest their own personal identity in the interview. In this regard, the researcher maximised this approach by first introducing the research problem and explaining that the investigation was prompted by her own experience of losing her job as an older, black, female worker. The researcher shared her anxieties and hopes with the participants. The participants who had similar experiences were fascinated by the title 'Retired but not tired; retirement a trigger for learning' and they were able to identify with the topic. Secondly, the researcher explained the participative process of data collection, so that women felt like 'participants' rather than 'subjects.' Finally, the transcripts were sent back to participants to be checked and verified.

### ***Semi-Structured Interviews***

Semi-structured were based around broad categories which first asked about the women's personal herstories<sup>4</sup> (Fonow & Cook 1991) in terms of when and where the women were born, their adult life, domestic situation and the number of children they had had. Specific questions around work history and formal and informal learning were also asked. Semi-structured interviews worked well due to the fact that they were more flexible than the standard structured interview, in which specific questions are asked with the omission of any new information that may emerge. The semi-structured interview enabled the researcher to explore emergent themes and ideas during the interview process. This interview method allowed for probing of relevant information, and impromptu questioning where necessary.

### ***Opening the Interview***

A reflexive, though well-guarded against derailment, discussion took place with each of the women interviewees. In conducting the interview, the researcher shared her own abridged biography, drawing attention to her employment and retirement life. This was an important principle in eliminating any perceived hierarchy in the interviewer-interviewee relationship by showing a willingness to share experiences during the interview process, as Green and Oakley (1981) promote. This process of sharing established rapport that enabled the women to provide

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<sup>4</sup> Herstory is a neologism/new word coined in the 1960s as part of feminist critique of conventional historiography.

personal information as a high level of trust fundamental to a feminist, in-depth interview had been established.

### ***Number of Sessions***

The researcher held one interview with each participant lasting forty five minutes to one hour and followed up telephonically as well as by email because of convenience. The follow up was used, where necessary to clarify issues. These follow up questions emerged as a result of the recursive process of listening to recorded interviews.

The process in which information is shared in the feminist interview is called “consciousness raising” (Fonow & Cook, 1991). This has the dual goal of unearthing information as well as providing information to the interviewees about specific aspects related to the research that might be empowering in particular, the reflective process. In this regard, Fonow & Cook (1991:4), state that consciousness raising may be used for examining women’s lives at ‘structural rupture points.’ In this instance it was the point of unemployment and problems related to this in the lives of the women that was of particular interest.

### ***Recording***

Information from the interviews was captured by means of audio-recordings, supported by note-taking. The reason for depending on the audio-tape was to ensure that the researcher was not distracted by the onerous task of attempting to write down all that was said in the free-flowing conversations. The researcher was able to listen to the women’s own voices as a reiterative process in order to clarify meanings.

### ***Data Transcription***

Data transcription and analysis are intensely subjective processes. First off, the researcher immersed herself in the data by repeatedly playing back the taped discussions, in order to simply listen to what was asked and what responses were given and contacting the participants telephonically and by email when unsure. Holding additional conversations enabled the researcher to ask participants to clarify issues. This is what Maxwell (1996: 4) calls “tacking back and forth between the different components of the research design.” Careful listening,

playback and telephonic follow up familiarised the researcher with the data and consciously brought subjectivity to the fore.

After listening to the narratives, the researcher began to transcribe the data. The participants were given a copy of the transcript for their comments and verification. This technique is also known as member or respondent validation, or member check. The fundamental issue in such an exercise is how far the researcher's understanding of what was going on in a social setting corresponds with that of participants (Cohen, Manion & Morris: 2000).

The researcher acknowledged the danger of subjectivity in the process of analysis, first because of her own experience of unemployment which led to her to research this area. Secondly, the risk of subjectivity is one of the criticisms levelled against qualitative research, specifically ethnomethodology. However, it could be argued, that no research process, embedded within whichever research paradigm, is free from researcher subjectivity. What was important was the acknowledgement of this by the researcher and how the researcher's subjectivity was managed. To this extent the researcher sent the transcripts to the interviewees for their comments and input in order to mitigate bias and validate the record.

Goodwin (2000) argues that the transcription process is recursive, wherein the ethnomethodologist has the dual duty of ensuring accuracy in the process of transcription and relevance in the analysis write-up process. The interpretative analysis was checked and validated by the researcher's supervisor and discussions around emerging themes established some boundaries for the interpretative process.

### **Analysis Process**

The research questions formed the basis for analysis of the gathered data. Once immersed in the participants' responses, the transcription was looked at with the intension of interpreting the social world that the participants revealed through their accounts. Asking the question: "What is meant in this case?" and paying particular attention to the experiences, language and contexts revealed provided ways of breaking into the discourse.



Questioning and attempting to see events from the various perspectives aimed to mitigate criticism against ethnomethodology which queries the centrality and importance of participants' accounts (Babbie, 2007).

The next step, in the analysis process, after the transcription of the data, was to use the conversational text, and pull out telling content. This was then inspected in order to reveal specific insights into the participants' experience and how this impacted on their perspective of their worlds. As the analysis developed, the researcher used colour codes to separate individual participants' issues and critical instances and then attempted to catalogue the emerging themes looking for patterns such as similarities and differences in the various categories. These themes explored the women's attitudes and feelings including ideas of self-confidence and assertiveness, infidelity, and spiritual growth and maturity. It also highlighted gender issues, and economic, socio-cultural and political fault lines.

The literature review included theories on aging, adult development and transformational learning. This was held up in an attempt to find a fit between what was experienced and educational theory. Tight (1983), citing Mezirow, differentiates three areas of adult learning which include the area of work; the practical area and the emancipatory area which involves self-knowledge and self-reflection. The emancipatory approach to adult learning has been influenced by Freire's (1972) conscientisation; Mezirow's (1975) emancipatory action; Brookfield's (1990) critical thinking and Mezirow's (1992) perspective transformation.

Omissions in the indexical representations led to noticeable gaps that resulted in hunting down further literature in an attempt to achieve a degree of praxis. From this process, the researcher was able to propose a hypothesis of how retirement could trigger life-long learning. This entire process was led by interpretations that the researcher made, which are, of course, all guided by indexicality and the recursive process of reflexivity.

### ***Ethical obligations***

Researchers have an obligation to ensure that ethical concerns are addressed in the design of their research project. According to Cohen, Manion and Morrison (2000), ethical concerns in

social and educational research are complex and often require a fine balance between the professional requirements of the researcher and the interests and dignity of the research participant. In addition, Maxwell (1996) asserts that ethical considerations should form an important aspect of the research plan. The ethical issues in this research were addressed through an application for ethical clearance to the university ethics committee. Clearance was granted. The application covered the following areas:

***Honesty and integrity***

The researcher informed the participants openly and truthfully about the purpose and objectives of the research and their role in order to obtain their informed consent. In addition, the researcher sought consent of the participants to record the interview using an audio tape. The consent stated that they were knowingly and willingly participating in the research and that they could withdraw at any stage if they felt uncomfortable with the process. They also gave permission for their real names to be used in the report.

***Vulnerability***

The women were not employed and the research process did not pose any threat in terms of vulnerability in the workplace as a result of the research. However, to the extent that opening up made them feel exposed, the researcher sought the advice from relevant experts on how to deal with the situation if it arose. Such a situation did not arise rather, one participant stated that the process had helped her “to just think and reflect about my life and my *quo vadis*.” Another said that she was fascinated and loved the idea that we may retire but we are not tired.

***Confidentiality***

Although the participants gave permission for their names to be used in the report, their names have been altered as pseudonyms have been given. This is to ensure their confidentiality.

***Using the research findings***

The participants were informed that the research report would be submitted to fulfil the requirements of a Masters in Education Degree and that the researcher might, in consultation

with her supervisor, explore possibilities of publishing further papers because the subject area is under-researched.

### ***Conclusion***

Chapter 3 outlined the strategy or plan of the research project. The next chapter provides a brief profile of each participant, and then analyses the findings of the study by identifying emerging themes and providing an interpretive analysis.

## CHAPTER 4: FINDINGS

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### ***Introduction***

This chapter details the findings of this research. The first section outlines the demographic information of the participants in terms of their age, place of birth, marital status and family situations, while the second section provides particulars about the participants' educational and employment 'herstory'.<sup>5</sup> The third section of the chapter synthesises each participants' interview in order to be able to identify the emerging themes. The fourth and final section offers an interpretive analysis of the critical emerging themes which have been organised into two categories, namely contextual and critical themes.

### ***Describing the Participants***

#### **Keketso Kau (KK)**

KK was born in Sophiatown, Johannesburg. She grew up and was schooled in Phokeng, Rustenburg, where she obtained a Junior Certificate at Bafokeng High School. She then proceeded to Jabulani Technical, Moretele Training College, where she qualified as a teacher. She attained her Bachelor of Arts degree from Vista University, now the University of Johannesburg. She pursued and obtained her Master degree in Education at the then Rand Afrikaans University (RAU) now the University of Johannesburg.

KK is married and has three children and four grandchildren. She started her career in education as a teacher and later became a principal. Her children are all adults and no longer live at home. She has been in the education sector for almost twenty years. She currently works independently as an education consultant, which she says:

“Came by coincidence because I had to leave the education department because  
...it was no longer conducive to be there.”

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<sup>5</sup> Herstory is a term that was coined in the late 1960's as part of a feminist critique of the term history. The term 'herstory' seeks to emphasize the role of women, and tell the story from a female perspective. The feminist critique asserts that women were written out of history.

KK left teaching during the tumultuous 1990s when there was pressure to redress the apartheid education system.

### **Nontobeko Kente (NK)**

Nontobeko was born in Orlando East, into a family of seven children, five of whom are still alive. Her mother was a teacher and her father a clerk in the city of Johannesburg. She went to school in South Western Township (SOWETO) where she completed her primary and high school education. She proceeded to Wilberforce College in Evaton graduating as a teacher. NK comes from a Christian background and she talks with fondness about her upbringing.

She was moved and agitated by the June 16, 1976 Soweto riots which changed her from a passive young person to a militant protester as she joined scores of confrontational students in a quest to pressure the government to change the political situation and gain freedom for the majority. She became an underground activist at a time where teachers were forbidden to engage in politics. She taught at the local primary school and states:

“[I] was teaching at Phakamani in 1977 when things became chaotic and [went] haywire. Students, who knew about my underground work asked me not come to school because there was going to be trouble. Things became so bad because of the upheavals and feeling insecure in a teaching environment. I left. It was then that I joined the bank.”

NK is a married mother of three grown-up children, two of whom are married. One of her children currently lives with her in Soweto. NK lived in the area that was a hotbed for political activity. In 1959 the Potato Boycott<sup>6</sup> march went through Orlando and in 1976 the Soweto school riots started in the same area. Her home is close to the scenes of these historical incidents which she witnessed and these happenings were to shape her life perspective.

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<sup>6</sup> This was one of the largest protests against the use of black prisoners as slave labour on Afrikaner farms. The potato boycott took place in 1959.

She broke the tradition of “once a teacher always a teacher” when she entered the corporate world as a banker in Johannesburg in 1979. NK was a practising Christian during the struggle era.

### **Freda Thebe (FT)**

FT was born in Polokwane - formerly Pietersburg - in the Limpopo Province of South Africa but she grew up in Soweto where she completed most of her education. She, however, finished her Matric at boarding school. She proceeded to the University of the North but did not conclude her studies due to the on-going “crisis in education.” This was a period of strife and intensification of the *anti-apartheid* struggle which affected tertiary education institutions in a significant way.

Freda comes from a strong Christian background where her minister father took a bold stand against *apartheid*. Her home was a meeting place for objectors who were evading police and needed to *rendezvous*. She understood the evils of *apartheid* at an early stage in her life and that it had to be resisted. Her father was affected by supporting the struggle. He was chastised and the church stopped paying his salary. During that time, the family survived on her mother’s meagre teacher’s salary. FT recognised that education was an important tool to fight *apartheid*. When she could not complete her university studies in South Africa she proceeded to study in Lesotho and the United States of America where she obtained a Master’s Degree in Economics.

FT has worked in the Non-Governmental Organisation (NGO) sector and Parastatals. She is passionate about development, poverty alleviation and the empowerment of women which she views as a cornerstone for building stronger communities. She is also interested in issues of human rights and social justice.

She resigned from formal work because she wanted to start her own consultancy business in development and poverty alleviation. She was driven by a desire to work in a free, creative and innovative environment. She holds the view that bureaucracy in government hampers programmes that can help to improve the lives of people.

### **Mapula Rathebe (MR)**

MR is an African woman in her 50s who did not disclose her exact age. She is a divorcee who has no children. MR comes from a family of four siblings, three of whom are boys. The children were brought up with a strong religious background and regular attendance at church. MR grew up in Soweto where she completed her education.

MR is a teacher by profession and holds a Master Degree in Education, and Doctor of Philosophy in Education which she completed part-time while holding down a full-time job. She worked as a teacher in Soweto and then joined a government department at middle management level. She resigned in 2008.

MR is a writer and spends her time developing material. She did an Early Childhood Development (ECD) course as a result of feeling bored and has been accredited by the Education, Training and Development Practices Sector Education and Training Authority (ETDP SETA).<sup>7</sup> She has trained practitioners at the Department of Education in the North West Province on how to monitor ECD on the ground and she is currently developing materials for the Department of Basic Education (DBE).

### **Khosi Moloi (KM)**

KM is an African woman in her 50's who also did not disclose her exact age. She grew up in Soweto where she attended school. She matriculated at Orlando High School where she was among very few learners who passed Matric the first time she wrote it.

Her working class parents could not afford university fees. Consequently she went to study nursing at Baragwanath Hospital (now Chris Hani). She completed a Bachelor of Nursing Science (B.Cur) degree through the University of South Africa (UNISA), studying part-time, and paying for herself. She also completed a primary health care diploma. In 2000 she completed a Masters Degree in Epidemiology at the University of the Witwatersrand (Wits) which she passed *cum laude*.

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<sup>7</sup>The Education, Training and Development Practices Sector Education and Training Authority was established in terms of the National Skills Development Act to facilitate training through learnerships.

Nursing and teaching were popular designated professions for Africans in *apartheid* South Africa where career options for non-whites were limited. People who held these professions enjoyed status and were often regarded as leaders. After completing her nursing course, she was young, ambitious, diligent and determined to excel in her work.

KM is a divorcee who had two sons, but only one survived. She has lived in Soweto most of her life but has since moved to the suburbs in the south of Johannesburg.

## ***Synopsis of Interviews***

### **KK**

#### **Leaving employment**

KK is a passionate and committed educator, seeing it as her duty to take time to listen to, and counsel her learners. According to her, educators have a duty to act as “social parents” to their learners, a role that she argues, extends beyond teaching in the classroom. While the 1990s brought celebration as the African National Congress (ANC) and other anti-apartheid organisations were unbanned, the education environment became riotous, partly because of these events. During this time, KK ascended to the position of a principal but the then National Education Union of South Africa (NEUSA)<sup>8</sup> ordered a “chalk-down.”

Her first meeting as a principal was held to discuss how the teaching boycott would be managed.

“There I was having been a deputy principal at high school, [and] achieved [the position of] principal. I was very excited. But all that went down the drain because people [teachers] were fighting and unwilling to listen.”

KK describes a school culture in which a hierarchy existed:

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<sup>8</sup> NEUSA, a progressive teachers’ union was part of the mass democratic movement of South Africa and it was involved in the struggle against *apartheid* education.



“And the junior primary school teachers were the most oppressed ones in the teaching fraternity. Principals were forceful and abusive and now they [teachers] were letting out steam...”

In this situation, principals became the primary target of the rebellion. This was perhaps exacerbated by the culture of domination of teachers by principals. Thus, KK made the choice to leave her job because of the hostile environment:

“Remember the political organisations wanted to bring down the apartheid Department of Education ... We, as principals, were the ones holding everything together, the school, children and parents and they had to break you as the principal. Principals were chased out of schools....”

KK loved her job and viewed it as her calling. However, surrounded by such ‘negative energy’ she found she could no longer teach effectively and left. The situation affected her health and well-being both physically and mentally. She became ill, and suffered from persistent stress related migraines. KK describes the situation as resulting in her feeling worthless and doubting her capability.

“Because my self-esteem was down, my personality changed. [I] felt useless, incompetent, I was disillusioned. My dreams were shattered, [my] leadership skills [were] tested [and I] became paranoid...”

KK found another teaching post at the Mopong Farm School where she assumed the setting would be less threatening and she looked forward to teaching again. What had excited her was that the school was being established and she would play a key role in managing the project. She had been head-hunted for the post, and that boosted her sagging self-esteem. However, she experienced similar challenges as at the previous school where she was employed and her health suffered further. The Mopong experience saw her exit from school settings but she believed she would continue teaching in other situations.

### ***Midlife crisis***

According to KK, women - herself included - do not experience midlife crisis, and when they do, it is a short predicament from which they have the ability to recover. Describing this she says: "*Tshimo ya mosadi e sekgwana.*" This Setswana idiom, directly translated, means that a woman's agricultural field is a small forest where she is able to preserve food for times when there is a shortage. She views women as creative creatures that are endowed with the resilience to withstand difficult situations and the ability to plan for such times of need. Women draw from their reserves, and therefore, are always able to take care of their children. This appears to be a mantra which has sustained her during difficult times.

"Women bounce back. Maybe we can talk of [a] temporary [mid-life crisis]. Even in your life you can be disillusioned now but as a woman you come up with a plan. Bana ba mosadi [children of a woman] will never be orphaned, as [a] woman ... will find something. That was why it said women were the ones who kept the home fires burning - they will burn even when there is no wood."

While KK describes this period as one of disillusionment and not as a lasting mid-life crisis, she does not seem disheartened, rather resolute. She has the ability to strategise and has the vision to foresee the needs of the future.

### ***Financial difficulties***

Due to the unplanned nature of her exit from paid employment, KK reveals that her retirement was financially difficult. She received a pension and used it to settle her bond and other pressing priority debts. She considered herself lucky because her husband was still working and he paid other costs such as their medical aid.

She later worked for a Nongovernmental Organisation (NGO) but her income was greatly reduced. She started a small business which created more debt for her rather than generating an income. Financial difficulties were one of the major challenges that she faced and had to deal with on a daily basis. She did not, however, regret leaving the formal teaching setting with its harrowing experiences. KK was aware of her own strength as an individual, her

qualifications, and her experience as an educator, and believed that, with some innovation, she would be able to generate her own employment as an education consultant. KK appreciated the need for a skills set that included networking and collaboration.

### ***Seeking Opportunities***

KK sought openings. She refers to the knowledge she gained teaching guidance which previously described the learning area of life orientation. She ascribes her success to her own resilience and the idea that women create chances:

“[Opportunities] emerged, they approached me and that led to other opportunities in the field. Then I opened my CC [closed corporation]. But it [opportunity] does not just come. It is your initiative as a woman.... It is the willingness to go out, see opportunities and take them... and being able to network and partner with others...”

### ***On-going learning***

She decided to pursue a Master in Education degree which she successfully obtained. She also started a business:

“I felt that I needed to channel my energy positively, because I was really losing it. And I got good marks. But I asked myself how long I would tolerate the situation... I tried to get into business [as] I wanted to do other things. I can't wake up and do nothing - I will die ... I set up a shop in Brixton.”

She has since entered the agricultural sector which she describes as stimulating:

“Now I have a new career... and [am] learning new things... about farming, perma-culture, healing and how they work. This has been possible because I left the comfort zone, even though not out of choice.”

Apart from breaking into the agricultural sector, KK is also pursuing a Doctorate in Education.

“What triggered that [her PhD topic] is my concern about our education system [which] is lacking and not holistic. My topic is lifelong learning as human development from an indigenous African perspective. I am looking at life-long learning globally, what does it mean? I am saying life-long learning from the African perspective will root the child. I am advocating for... [it] from the cradle to the grave. I am very interested in value systems and how we can infuse [these] into life styles.”

### ***New Avenues***

KK believes she had to venture into the unknown. Leaving teaching made her more innovative and brought with it the realisation that she could apply her knowledge and experience in different settings and that teaching, learning and education do not only take place in classrooms. She had to find her niche by looking at things differently.

“You know I always say we like comfort zones, we don’t want to take risks, go out there explore and develop our skills. But God pushes you out, makes people push you out to the greener pastures. I do not retire. That is why you also say retired but not tired. I feel if you retire you expire. You stop, your mind stops functioning, thinking you wake up to nothing. You can rather say you slow down. Retirement, forget it.”

Although it was difficult when she started, she has adjusted her lifestyle to being self-employed and enjoys this even though there are challenges. She is able to take risks, explore and be innovative and she feels her work has given her peace of mind. KK’s critical change in her life was to move off familiar ground, use her knowledge and experience and establish herself as a consultant.

### **NK**

NK has a deceptive casualness about her which belies her depth and understanding of issues. This could be a defence mechanism which she developed as an activist during the anti-

apartheid struggle, constantly having to evade police. It is only with persistent probing that she drops the mask and talks about herself, work, family and activism.

### ***Leaving Employment***

In 1977 NK was an underground radical who no longer felt safe in her profession as teachers were supposed to be apolitical. She left teaching in 1977 when teachers resigned en bloc, under the banner of the Teachers Action Committee (TAC), in support of the student strikes of 1976. In 1978 she joined a major bank, one of the largest in South Africa.

She left the bank in 2000 to become a student. Her choice to exit full-time employment was based on what she describes as a “spontaneous response to be a spiritual person.” Before the 1994 democratic elections, her life revolved around her family, work and struggle activities:

“We were activists. We were involved in the struggle. I was studying theology at that time. I always worshipped before going to meetings. God was calling me but I was not aware of this. My focus was on the anti-apartheid struggle. Studying with a Theology College. I completed my certificate, I graduate[d] and invited all my comrades<sup>9</sup> and they could not believe that I was studying theology. My life was a quadrangle: struggle, spiritual, corporate and my family.”

NK left employment freeing up her time:

“I wanted to pursue my studies and I spent most of my time studying, doing my assignments... without worrying about the clients at the bank... And I was very happy and excited about the grades I got.”

### ***Midlife crisis***

NK believes that people can, and do, experience crises at different stages in their lives. She describes how a female friend had perceived turning forty as a catastrophe.

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<sup>9</sup> ‘Comrades’ was term used in the black townships among activists who were involved in the *anti-apartheid* struggle. The term originates in the communist countries and may also be the influence of training received there.

“I had a friend... she was turning forty and we were to celebrate her birthday. But she was so depressed and kept on saying ‘Why me forty years?’ Now this lady... cannot accept it, she cannot take it. Instead of thanking God... for being with her all these years and feeling blessed to reach forty, no, she is denying. She is depressed about the wrinkles and how she is looking.”

NK argues that retirement can be difficult and stressful and even result in ill health. She attributes the anxiety to loss of income, possibly reduced social contact and above all waking up and having no purpose.

“Other people at sixty say “I am going on pension what will I do, what will I eat?” [They] stress and become entangled in this cobweb and get trapped in a web of negativity and misery, which is why we have more women with diseases. That is why we have high rates of... high blood [pressure]... because of our life perceptions...”

NK argues that African women are predisposed to such conditions.

“...and it is really because we stress too much as women, especially us African women. But I believe that you are the author of your life and you can [control your life].”

NK argues that while crises can be experienced before or after a person reaches midlife, the experience of that trauma and its successful resolution depends on the person’s perspective.

“The attitude is a big thing... You see it will vary according to how you see life, because in life you decide what you want and fight for it! You remember how we fought against amabhunu<sup>10</sup>? And everybody thought we were mad. But we forged ahead because we wanted our freedom. Today everybody is free although we are not all having a better life. Life is what you make it... you have to

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<sup>10</sup> Amabhunu is a Zulu word meaning Afrikaners.

be brave and take risks. We could have been arrested. And if you want to be gloomy and stay in a cocoon, you will... It is really your choice.”

NK’s statements reveal gritty determination and a belief in an internal locus of control. She is a strong advocate of being in charge of one’s own destiny. Although she was an activist, she recognises that not all have benefitted equally in the new democracy but emphasises that we are still responsible for the outcome of our lives. She stresses the significance of internal strength and resilience in fighting for what you believe in.

### ***Addressing Challenges***

NK feels that she has never experienced a ‘crisis.’ She adheres to the philosophy that a person must try to live every day to the fullest seeking happiness and in gratitude to God. The dictionary meaning of ‘crisis’ is “a decisive moment; a time of danger; a time of great difficulty; a turning point.” It seems that ‘crisis,’ to her denotes helplessness and a failure to draw upon inner strength. This is illustrated when she states that, although problems arise, she takes the attitude that we have the power to change things by being proactive, positive and resilient.

She gave an example on her home front, of the difficulty she experienced in her marriage, which she did not regard as a ‘crisis’ however. Her response demonstrates that human beings have the power to manage their situations even if they are difficult:

*“Sa hlula amabhunu singa phinde si hlulwe hini.”*<sup>11</sup> This Zulu phrase directly translated means “We beat the Boers what can beat us now?”

She continues to explain,

“There were times when my husband was a man about town, you cook nice food and he does not turn up. I used to worry a lot. I then took a decision that we are all adults and accountable for our lives and I stopped worrying about him

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<sup>11</sup> The anti-apartheid struggle was difficult and risky, it was the brave and committed who dared to join hence the Zulu expression which means that we beat the Boers in the struggle against apartheid what else can beat us.

because he was enjoying [his life]. My father would say there are two Ws which are destructive to men - women and wine.”

In the face of this domestic condition she made a conscious choice to view her relationship differently. When she accepted that the two “Ws” were the problem she decided to try to stop worrying and focus on her children without, however, totally excluding her husband. She explained that divorce was not an option because that would mean that she had failed in her marriage. She would be described as “Obuye mwendeni”<sup>12</sup> Within the cultural context; she succeeded in keeping her family together without letting her husband’s behaviour overwhelm her.

She recounted a true instant of her interpretation of crisis in her life as the time when her brother died. She had never experienced the loss of someone close and loved by all in the family. It seems that a ‘crisis’ to NK is a situation over which she has no control. The death of her brother was extremely painful. She describes her anguish:

“I was so shocked and we walked for a long distance without realising that we were not wearing our shoes and our feet were getting wet and cold in the morning dew... We were going to tell our relatives that my brother had died... I do not think I will experience that pain in my life... death is just so final: you will never see that person again. That, to me, was a crisis, beyond my control.”

### ***On-going Learning***

NK states that she was triggered to learn by her desire to gain a deeper understanding of her religion.

“Theology is not about ‘Jesus was born in Jerusalem or that he had eleven disciples...’ In theology we have history, [which is] systematic, [and] ethics.

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<sup>12</sup>This is an Isizulu expression which means that a woman has given up on marriage and failure is implied.



Bishop Tutu<sup>13</sup> would say to me “We all are blind and let not the blind lead the people of God.”

Her search for more in depth knowledge was an attempt to enable her to better contextualise, and create the appropriate linkages in the teachings of Christianity so that it has relevance in the current world.

“I believe that if I go on learning I will see better and be able to lead and guide the people of God... and that will happen only through on-going reading and learning.”

NK’s learning has transformed her understanding of theology and her knowledge translates into a way of life.

“You cannot just learn them [the Ten Commandments] and say you have mastered [them]. I have responsibilities to [the] community that I minister to. You must live by example, not only in church, but all through your life.”

NK is of the opinion that learning should not only be about obtaining a qualification, but should encourage gaining knowledge in order to make a critical difference and change the lives of South Africans. Her commitment is partly influenced by her anti-apartheid involvement but also the influence of role models such as Arch Bishop Desmond Tutu.

### ***New avenues***

NK’s focus now is her part-time, flexible work, taking care of her domestic sphere, studying, praying and relaxing. Her children are grown up, two are married and she lives with her husband and their youngest child. She spends a lot of time with ‘herself’ thinking and reflecting on life. She appears to be content with her new roles in her church, family and in the

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<sup>13</sup> Arch Bishop Desmond Tutu is a Nobel Peace recipient who took a bold step against *apartheid* in the struggle for a free, non-racial and democratic South Africa during the 80s and 90s. He continues to be vocal about democracy today.

community generally. She sees herself as being in her prime and enjoying the harmony in her life.

“We are from a gregarious scenario but as I grow, I am mature. [I am] a granny and responsible to the people of God. I enjoy my peace of mind and meditate.”

**FT**

### ***Leaving Employment***

Similar to NK, FT chose to leave employment as she wanted to become self-employed. She felt the need to be independent, innovative and creative without having to ask anyone’s permission. Her two-year employment contract was extended by an additional year in order to manage the change process of a government parastatal where she worked as the transformation head.

When her contract was extended, a new Chief Executive Officer (CEO) joined the organisation. He had a different view of change management with which FT did not agree. The tensions escalated. FT decided to exit her employment as she felt that she had achieved her initial objectives and because of the clash of opinions:

“I am not retired. I resigned from my job because I wanted to be independent and self employed. But also I could not agree with the definition of transformation by the new CEO and we clashed too often over that...”

Similar to NK, FT made the conscious choice to leave full-time employment. Exiting employment, FT’s plan was to start a consultancy business, which would focus on development.

“I wanted to start my own business where I would have the freedom to be creative in project choice. My speciality is social and economic development, job creation, and poverty alleviation and I felt that with the knowledge and passion that I have I could contribute.”

### ***Midlife Crisis***

FT understood the concept of midlife crisis as a male-centred one not commonly experienced by African women:

“Midlife crisis has usually referred to men. Women do not really talk about midlife crisis... Although women [do] experience physical changes, biological changes, mental shift in terms of how they perceive themselves and how others perceive them. But usually when I hear midlife crisis I equate that to men, especially white men because they are the ones who change drastically and buy sports cars, [and] go out with younger women.”

### ***Ageing***

FT thinks that women experience ageing physically, biologically and psychologically. For her, the biological changes are the normal ones associated with menopause:

“...women experience physical changes ... such as thinning hair and waning bone mass, wrinkles, stiff joints and diseases such as diabetes, cancer, and hypertension.”

The changes are also psychological though which involve mental shifts in terms of how women perceive themselves and how others perceive them, in the family, socially and perhaps in the workplace.

“But in terms of me, how my ageing has affected me, I am 53 years, but I do realise that people treat me differently than they did when I was forty. Expectations from family members, friends - even strangers - have certain expectation which are associated with age.”

At home she assumed significant cultural responsibilities when her mother passed away in 2006. FT has taken up the role as the elder in the family. Some males that she grew up with, who used to call her by name, now refer to her in other ways:

“Now some of my age mates call me 'Sisi' or 'Mama.’”

She argues that when she was younger there weren't any social or personal reminders of her age. She feels that getting older may change the manner in which one reacts to the world but one is still able to enjoy new ideas.

“But there are more biological things that remind you that you are older [such as] feeling tired, and not being excited by small things. I think when you are fifty, sixty, even eighty, it is a mental state. Instead of allowing yourself to enjoy life as you want, you tend to say I am old so I can't do this or that. I am still able to appreciate new music, ideas, I am not dead inside. I continue to appreciate life and its good things.”

FT's view is that ageing is about “growing up and [is] not a crisis, it is in my hands, in my power to determine the life that I want.” This is a belief that was also expressed by NK, and KK who feel that attitude and perspective shape the way in which one interprets situations and understands reality.

### ***Addressing Challenges***

FT has found self-employment challenging. One of the key tests is that of securing contracts that enable her to sustain herself financially over a period of time. However, this is difficult to achieve as weeks spent writing and submitting proposals can end up being fruitless.

FT also often experiences loneliness. Her isolation is a result of her working environment which she describes as solitary:

“Another challenge is that you work from home, you work alone, you have your own space but it really becomes lonely... unlike in an office where you enjoy the company of colleagues. Social interaction is missing...”

Furthermore, companies offering the same product or service are seen as competition, and this makes it difficult to build a network. FT recognises that the consulting business requires one to have patience and endurance. Opportunities do arise and she gets calls from people who have

seen her website and have been impressed by it, however, these calls often do not translate into business.

FT also argues that building a consultancy requires good marketing, something she feels she is not effective at. Given these challenges, in particular the slow pace of business, FT is considering seeking formal employment. However, she seems ambivalent about the issue of finding a job but might be forced into that direction by her financial situation:

“Only recently - last year because it is tough financially - I thought of getting full time employment but I have not been aggressive in looking for a job.”

### **Heading the Family**

Like NK and KM, FT also identifies the death of a loved one as a crisis point in her life. NK and KM explain the deep pain that was caused by family members' demises. FT identifies a true life crisis as the death of her mother which altered the responsibility structure making her the matriarch of the family. She explained that, as the eldest in the family, she assumed the role of the “*Kgadi*.”<sup>14</sup>

“...in Sepedi tradition you are given the title ...Kgadi and that comes with huge responsibilities.”

FT felt that it was her duty to keep the family together, guide it, and undertake the necessary cultural rituals.

“...being the eldest I felt that most of the burden is on my shoulders. How we take care of the family... My brother got married last year and I had the key [financial] responsibility...”

Heading the family requires financial resources; however, it also includes providing direction and leadership:

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<sup>14</sup> *Kgadi* is a Sepedi/Northern Sotho word meaning the elder in the family who is responsible for cohesion through passing down the family traditions, values and rituals.

“The passing of my mother has had a profound impact. [I have to] ensure that the family unit is intact. Supporting and loving each other... whether I have put it on myself or whether society expects me to do it, it is huge.”

Interestingly, the above quote illustrates an uncertainty regarding assuming the role of the head of the household and whether this is imposed by oneself or by society. Typically, FT is doing what she learned and accepted as a child by assuming the responsibilities of the *Kgadi* without anyone telling her to.

However, even after taking up the accompanying duties, she begins to reflect on the significance and weight of her position and how she can fulfil it. She is also conscious of the fact that her siblings are capable of making their own decisions. Her philosophy is that her family members should not be treated as empty vessels into which ideas are fed.

Her approach to executing her role as *Kgadi* is therefore to encourage participation and consultation and not behave like a powerful, controlling matriarch. FT is aware of the tensions in her complicated situation:

“It is a major responsibility and complicated by the fact that the siblings are not children... They have knowledge [and] opinions about values and traditions... but they still need (emotional) support, which they received from our mother. Is this cultural?”

As the *Kgadi* she sees her multi-faceted job as entailing counselling skills which require that she understands the socio-cultural milieu within which she operates and that involves understanding the historical perspective and the needs of a changing society. The support needed may be emotional, as well as focusing on maintaining the culture and rituals that need to be performed.

“Rituals are very important to know and understand because they must be carried out. If a person does not do the rituals they might have problems which

they cannot understand. So I have to know and understand them so I can teach the others.”

### ***On-going Learning***

A transformative moment for FT occurred when her mother passed away and she had to assume the role of the *Kgadi*.

“The passing of my mother has had a profound impact. In a way I grew up and have had to ensure that the family unit is intact.”

The impact has been such that it has triggered FT’s desire to gain deeper insight into her identity.

“The past two years I have been trying to understand who I am and what my purpose in life is, and I have found myself becoming more and more spiritual.”

Her spiritual growth is self-directed and guided by reading books:

“I have picked up one author who helps me understand the world better without taking me away from my Christian beliefs.”

FT, like KM, stresses and recognises that she has to strengthen her skills in order to be able to develop her consultancy.

“The type of work that I do requires me to do research. Every project that I undertake requires me to continuously learn and I also update myself in terms of skills and understand the technical terms, legislation and policies and how government works. One has to keep current all the time, as I cannot depend on what I learned ten years ago.”

“I am a self-directed learner. I buy books to see what the new approaches and jargon [are] because people also judge you according to what you say.”

FT explains that she has a wish to take up formal learning, however, she has, thus far, been prevented by the lack of financial resources.

## **MR**

### ***Leaving Employment***

MR left her job working as a specialist in a government department in 2008. Her resignation was due to frustration with the manner in which promotions were awarded when she was repeatedly overlooked:

“I started the adult [education unit] in the department, but I was never promoted. Instead people with no knowledge and experience were hired and I had to train them... the third time [it happened] I decided to resign. It was too much.”

The situation was exacerbated by the fact that her junior was promoted and became her boss. Having started the unit, MR had a wealth of experience and knowledge, which she argues, her employers used, but refused to reward.

### **Midlife crisis**

MR supposes that a midlife crisis could be a change in the manner in which one behaves. She is unsure of whether she has experienced a midlife crisis, but does acknowledge that her approach to the way in which she makes decisions has altered. She got tired of relying on others and trying to convince them to help her and felt an urgent need to find alternative ways to conduct her life. MR claims to have modified her previously submissive behaviour to become more assertive, assume responsibility and get tasks accomplished. She feels affirmed by her changed behaviour. She explains her transformation in the following way:

“I don’t know if I have experienced [a] midlife crisis. But I can tell you that I have changed a lot since I became fifty. When I want something, I do all I can to get it. For me it is about fulfilling what I want. If I want to go to Cape Town and I ask someone to take me there and they dilly dally, I simply call a taxi and go to the



ORT<sup>15</sup> for my flight and off [I go] to Cape Town. Before I used to beg and beg and if I got disappointed it was okay. Maybe that is the change and perhaps the midlife crisis. I do not know.”

### ***Unemployed***

MR’s story is poignant and demonstrates the possible effects of unemployment on older adults - the loss of income, lack of dignity provided by work as well as ongoing feelings of loneliness. MR’s self-esteem seems to have begun being eroded in a job that did not recognise and reward her. When she decided to resign it was because the work situation was impacting on her psychological state, but when she left her job, she had projects to manage. Although these small jobs did not pay much she was happy and felt much better. Unfortunately, the work came to an end resulting in financial difficulty.

“I ha[d] to make means... I managed but it was a struggle. But I was okay away from that humiliating stress and frustration.”

MR also gave up going to church possibly because she was not employed and had no money and felt less worthy in her new financial situation:

“I also don’t go to church like I used to. I used to be very active in church and I liked it. And I socialise less. Maybe I am self-conscious and have a complex because I don’t have a job and worry about what people say about me.”

She furthermore describes a situation in which she feels she no longer fits in. She grew up in the township, however, when she is visiting most of her contemporaries are not there. There are many unemployed women who think that she is one of them, possibly because she is in the township when people are at work:

“The main challenge is being alone - you know sometimes I go to my home in Mofolo, my brother lives there. And eh... those unemployed women in the

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<sup>15</sup> Oliver Reginald Tambo International Airport in Johannesburg, South Africa.

township when they see me they think I am one of them and in the afternoon they would say to me, "Let's get a 'set.'" A set is township [language] for three beers, which when you buy you get a discount. They do nothing else but drink the 'set,' get drunk and that is their way of life."

MR now lives in the suburbs. When she returns home, she finds the situation isolating and she feels alienated:

"When I am at my house, this big beautiful house in Waterkloof, again it is very lonely. Who do you talk to in the suburbs? I don't even know my neighbours, their surnames and we do not interact. I can tell you it is... very different from the township where I grew up and we visited each other and asked for salt if we had no salt."

MR is an educator at heart, and worries about the purposeless life of unemployed women in her township. She thinks about ways of helping them to live a better life, but so far this remains an abstract idea that she merely ruminates about:

"When I say to them let us run some workshops to empower them they do not know what I am talking about. I have thought about joining the ANC Women's League<sup>16</sup> and through it introducing such women's empowerment workshops but I have not really pursued it."

She is currently looking for employment and says:

"Now I want to look more aggressively. I am looking to meet someone and I will really beg, if have to, and ask her to give me a job."

### ***Financial Struggle***

MR explains that the most difficult challenge to leaving employment is financial:

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<sup>16</sup> African National Congress Women's League is part of the African National Congress, which is currently the ruling party in South Africa.

“I have to make means to patch. I manage but it is a struggle... the challenge is always funds and trying to make ends meet. But I also have supportive brothers... When I need food I go to my brothers.”

MR has experienced financial constraints - a situation which has forced her to modify her previously extravagant lifestyle when she was employed and had financial freedom:

“I used to be a great shopaholic. I would go into Spitz<sup>17</sup> and buy more than one pair of shoes. I liked expensive shoes... I had an account at Shirley’s.<sup>18</sup> I don’t do that anymore, maybe it is because of my financial situation. I was very active in church and now I don’t go. Maybe I have a complex because I am not working.”

### **Pursuing Opportunities**

MR has decided to seek formal employment even as she pursues her consultancy efforts. She does appear ambivalent about her employment status though. She now considers herself unemployed since it is a struggle to secure projects as a consultant. She does not consider herself retired and needs to ‘aggressively’ seek employment. One of her job seeking strategies is to use her network of professionals to inform and advise her about job opportunities

### ***On-going Learning - Learning as Transformation***

MR sees learning as a positive coping strategy particularly in trying times.

“I have a PhD and I did that when I had problems with my husband, even my M. Ed I did during difficult times. Learning for me is a way of using my energies positively, especially when I face serious difficulties. My books are a welcome diversion - at least when I finish I have something to show.”

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<sup>17</sup> Expensive shoe store selling designer brands

<sup>18</sup> Clothing store selling expensive brands

When she left her job she decided to do a course in Early Childhood Development (ECD). Furthermore, for MR learning offers exposure and new viewpoints on life:

“And of course, when you learn you grow and develop and see life from a different perspective.”

## **KM**

### **Leaving Employment**

KM was head-hunted by the mayor of local government to develop programmes for communities in the municipality. She was excited when she joined the municipality on a five year contract in 2001 as the community liaison director responsible for mayoral projects. However, she soon realised that the bureaucratic environment was constraining because she could not work as a professional. There was also an increasing negativity in the department towards her.

“I was very disappointed because I could not use my skill and expertise to help communities. You know, local government is where it happens [service delivery] but here I was with all the knowledge and a passion to serve.”

KM describes how her employment became administrative, unstimulating and lacked professional growth opportunities.

“I was behind the desk and struggled to get approval for projects. It was very frustrating and disappointing. Unlike the NGOs, I found government intolerant of new ideas.”

She furthermore explains that she was side-lined and the last straw was when there was restructuring and her post was downgraded. The demotion meant a lower salary, fewer incentives and less responsibility.

“I was forced [in] to early retirement; there were lots of employment dynamics: some thought I was opinionated and thought I knew [better]. They wanted to get rid of the post, but I think it was me they were targeting.”

Comments and criticism brought her work situation into sharp focus and she began to question the wisdom of working in an environment that did not appreciate and utilise her expertise:

“I had pressure from my ex-employers who said that I [was] an epidemiologist and yet I decided to be a clerk at the municipality and I began to question my decision [to leave her previous professional employment].”

KM reflected on all the factors that pertained to her employment and the comments of her professional colleagues and decided that she would take the risk of early retirement. It was a gamble because she would lose her income.

“The downgrading of the post made me realise that I could not be happy working in such a hostile environment. The salary was good, very good, but no I decided I could not be where I was not wanted. Plus my previous employers comments made me think about the effort I had put [in] to be a professional and it was going down the drain, for what?”

### **Midlife crisis**

KM explained that she experienced physical changes as a result of maturing and ageing. Her children had grown up and she has grandchildren. She views the physical and biological changes as normal parts of growing old and not as a crisis. Furthermore, like NK and FT she explains that she socialises less than she used to when she was younger:

“Yes I see physical changes - my hair, sore knees, and menopause. I think it is normal with growing old. Socially though I am not as mobile as I used to be. I have slowed down, not for any particular reason maybe its growing older ...”

KM explains that she experienced a crisis at two levels: in the new work environment and then in her family when her child was diagnosed as suffering from bi-polar disorder and

subsequently passed away. As a single parent she was all alone and had to get through these crises by herself.

At work she had to adjust to an environment which was slow and bureaucratic. This situation was different from the flat structure and accelerated decision-making processes which she was used to in an NGO. She was concerned that she could not act like a professional.

“The first crisis was the new work environment, a bureaucracy which was extremely stifling. Even if you had an idea, you ha[d] to go through a whole line to get approval. And professionally I could not implement my ideas because I was office-bound and was the middle man in the mayor’s office. The working environment had changed completely for me.”

She, however, displayed resilience and the ability to think about alternatives when things did not work out.

The situation worsened and she decided to quit at the end of her contract;

“After my five year contract I decided that it was enough. This was not the place for me. I felt I needed to do something where I would be appreciated and my skills used meaningfully.”

### **Financial Difficulties**

Like KK, FT and MR, MK experienced financial problems as a result of her loss of income. She won a contract to do work for Gauteng government and had to borrow to finance the project;

“For the contract to kick-off, I had to have funding to pay the interviewers so I used my overdraft. I struggled to get my last tranche. The contract has not been fully paid. An amount of R600.000 is outstanding.”

### **Seeking Opportunities**

KM decided to pursue consultancy work because she needed to generate an income. She was qualified and skilled in the health sector. Similar to KK, FT and MR, KM decided to revive a consultancy company that she had previously started. Through this she sought out contracts. Like KK, FT and MR, KM describes the consulting environment as precarious as it does not provide a steady source of income.

KM does not regret retiring and feels that she is more fulfilled than she was as a director of community liaison.

“I have no regrets. I had contract work for two years. It started as a six month post but it ended up being two years. Then I had another opportunity in a consultative process of a health project but the biggest challenge is funding for NGO work. I am working and the money, though not as much... is enough for us [and] I am happy.”

### **On-going Learning**

KM believes in on-going learning and that one is never too old to learn and develop.

“No there is no age for learning, it happens all the time. After seven months of dryness I took the risk knowing that I am up-skilling myself and use my time positively.”

KM continues to acquire knowledge and technical skills to enhance her capacity as a consultant. She also explores her spirituality. She says that she cannot tolerate being aimless.

“I cannot stay home, do nothing and dust cobwebs. I would go mad!”

In order to enhance her consulting skills she did a Monitoring and Evaluation (M&E) course with the University of Pretoria.

“During my dry period [when she had no jobs] I said let me do something with my time, revamp my energy and skills and I did the M&E with Tukkies.”

As a result of her son's mental illness KM became more spiritual. She says the pain she experienced was very deep.

"In 2006, I also had the turmoil with my son's illness. He had bi-polar mood disorder and it had affected us and changed our lives as a family."

Her son subsequently died which was devastating but it was during this difficult time that she experienced a spiritual reawakening.

"The pain I had with the loss of my son... I could understand when the psychologist said to me it is more difficult for me because I lost my son twice. He said that there would be times when I am grappling with the first loss - when my son lost his mind - and the second was his death."

"My son lost his head/mind/madness. I never had a true reflection of what losing your head is [until] ... I was grappling with this stranger and I questioned why it had to happen to my child."

She describes how this turmoil affected her family;

"...all of a sudden he was depressed, withdrawn, [had] mood swings, aggression. It took its toll..."

KM learnt to accept the issues that she could not change and tries to look at the negative aspects of life positively, and use that to energise herself. She appreciates what she has and does not hanker for what is beyond her reach. During the difficult times, especially when her son was ill, she resorted to reflection and prayer in order to cope with the pain and support her son and other family members. She describes that period as one of reawakening whereby she realised that her family was not immune to the hurt which other people experience.

"I accept that my family will have such problems like others. I accept things that I cannot change."



Her turning point was when someone from the non-orthodox churches invited her to join their prayer group. “In that depressed state someone approached me for prayers and I have never looked back.” KM says that the group has helped to accept her difficulties which she describes as “challenges.”

“I know that being a Christian does not mean things will always be cosy for you, and that [in] all churches irrespective of whether it’s the Anglican or the other churches God is there and listens anywhere, anytime and always. I know that even gold has to go through the furnace before it can become beautiful and shiny so we are tested all the time.”

As result of her strength, KM has no regrets about the decision she took to retire from work. She lives on work that she gets as a consultant which is inconsistent but she is able to cope financially.

### **New Avenues**

KM was forced out of her job because of various organisational dynamics and restructuring, however, she is philosophical about it:

“The pressure was too much and I had to think out of the box. I believed that I still had a future even if I left. Yes, I retired but I was not tired. I have a lot to offer. After leaving I revived my consultancy and looked for consultancy jobs and got a contract with the Department of Health to evaluate their VCT<sup>19</sup> sites. I always have something to do.”

KM explains that the consultancy work is demanding but she is getting used to working on her own. She has adapted her lifestyle to her situation and she is comfortable as a consultant. Like KK, she is able to take risks and does not think of seeking formal employment.

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<sup>19</sup> Voluntary testing and counselling sites where HIV status is personally acknowledged and measures taken to get patients on treatment and compliance programmes.

### ***Ageism***

KM believes that for older people the qualifications and experience that they have do not always assist one to find opportunities. As a diligent and ambitious nurse, she was too young to be promoted to higher positions, the highest of which was the matron. Now as an older person she has found that age can again be a factor in finding work.

“When I was at Bara<sup>20</sup> I was too young to get a promotion and now...You know when you are close to sixty, it doesn't matter what your C.V. says. People always doubt you and think that you are tired. There is an assumption that... you will soon be 'leaving' them [about to die].”

She holds the opinion that the academic sector seems to appreciate older professionals. Obviously this is personal view which was informed by her experience as a worker and a student at the University of the Witwatersrand (Wits) in the 1980s. During that time Wits was one of the liberal universities that publically opposed apartheid and facilitated the entry of African learners to the university.

“The only place that appreciates the elderly are academic institutions. There is no retirement. You retire at the retirement age in order to get your benefits professionally. Professors, the older you become the more valued. [You are] considered wise and knowledgeable in the field... In other sectors you have to move on and give space to the younger ones.”

MK did not enjoy success when she applied for a post at a government department.

“I thought this one is for me when I read the job description but I did not get the post. I did not get it I think because of my age.”

### ***Interpretive Analysis***

The research question explored the major changes that the five African women between 50-59 years experienced when they retired and attempted to ascertain whether retirement triggered

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<sup>20</sup> Baragwanath Hospital now known as Chris Hani Hospital in Soweto.

learning. The analyses of the conversations reveal some common facts and patterns pertaining to the women. These are categorised now as contextual themes with a section on learning theory-related themes following after.

## **Contextual Themes**

Literature on adult development, ageing and learning shows that socio-cultural context, as well as the economic and political environment, play a significant role in the life of an adult. Indeed, the women who were interviewed in this project demonstrated that all three conditions shaped their lives. The context of apartheid provided for growing up and being socialised in one of the most difficult eras in South African history.

## **Apartheid as the Backdrop**

The participants all came from Soweto. They were born in different villages but their parents migrated to Johannesburg in search of work. Their family backgrounds differ in terms of class, language and culture. The families mostly occupied the ranks of the middle, working class. All five women grew up during the apartheid era and were socialised in the milieu of white superiority. Race was the key classifier of life in South Africa. The participants were schooled under the system of Bantu Education and were forced to live in separate townships demarcated along racial and tribal lines. The purpose of Bantu Education was to reproduce the apartheid hegemony. It, therefore, encouraged rote learning and did not promote critical or reflective thinking.

The careers that were open to black people were limited to nursing, teaching, policing and ministry (Clark, Worger and William, 2004). Professions guaranteed life-long employment. "Once a teacher, always a teacher" as NK put it was applicable generally to African professionals.

The participants in this research are all professional women. KK, MR and NK are teachers. KM was trained as a nurse and FT was a development worker. KK was brought up by her mother, a domestic worker and maternal family. She did not ever know her father. FT's father was a minister of religion and her mother a teacher. Education was emphasised in the family. NK's

mother was a school teacher and her father a clerk. NK followed in her mother's footsteps and became a teacher. MR and KM's fathers were the sole bread winners while their mothers ran the home and cared for their children.

Some of the families of participants were highly politically conscious and, as young girls, the participants were thus exposed to a stance against oppression of the majority. Having resisted apartheid in some way (personally or by watching their parents) influenced and changed them. The impact of their education and the political system on the five participants is revealed in different ways. The need to actively fight the system is evident in NK's illegal political involvement with opposition groups.

FT's father was a progressive minister whose salary was suspended by the church for being outspoken. He arranged rendezvous points for underground meetings during the anti-apartheid struggle. Education was encouraged in these families because it was seen as a weapon against apartheid.

Although Bantu Education was meant to be domesticating, two participants broke the expected code of behaviour and gained a wider standpoint holding views that challenged the status quo. Reasons for this might have been exposure to other views about life or that their parents were educated professionals who had expanded their own thinking and took a more critical stance.

FT left South Africa to study in Lesotho because the 80s were a time of intensified anti-apartheid resistance. "I could not complete my degree because of the strikes....I went to Lesotho, but moved on to the US to study at varsity."

All the near-old women are concerned with social justice. They are aware of the sacrifices made to bring change. They actively contribute to promote a functional country and see themselves as having the capacity to contribute towards deepening democracy, development and peace in their own communities.

KM became active in an emerging health non-governmental organisation in the 80s where her consciousness was raised about the injustices of apartheid "I belonged to SAWCO (South

African Health Workers' Congress)...I started [an] empowerment project to teach women about health, especially cervical cancer." KM had developed beyond her nursing career through exposure to other health professionals, white and black in the NGO and the university setting.

### **Tradition and culture**

The participants were brought up in the township where, perhaps, culture and traditions were beginning to be diluted by town life away from traditional villages. From the analysis of the accounts of the participants it is clear that culture and tradition have the potential to affect transformative and emancipatory learning. Childhood socialisation, through observation and communication, might be so entrenched that it can act as a barrier to transformative learning in certain instances. The experiences of FT and NK demonstrate the possible constraints of culture and the potential conflict with new assumptions and perspectives.

FT was a minister's daughter living in a mission house and traditional practices and rituals would not be appropriate here. She had been exposed to diverse cultures and values while she studied in the United States. She faced a challenge when her mother passed away and she had to assume the role of *Kgadi* which comes with responsibilities pertaining to retaining the tradition, culture and values of her family.

Nobody conferred the role of *Kgadi* on her but she had seen how the eldest in the extended family took it on. She is conflicted about whether she had a personal choice or whether society expected her to assume responsibility. She questioned the relevance of African culture and Sepedi tradition. She worried about the expectations placed on her to carry the emotional and financial responsibilities of family. She does, however, believe it is very important to remember the rituals and what could befall one if one did not: "You have to conduct the rituals otherwise things can go wrong..." There is clear conflict between her socialisation and her experiences in different settings when she was studying abroad. The other interesting thing is that, as a minister's daughter, she still considers the importance of traditional values and the effect of rituals if not complied with. This is evidence of a plural belief system, in which Christianity and traditional beliefs seem to co-exist.

KK was taught that women are the anchor in the family. They are created as 'preservers.' Often hardships are faced but women are able to 'bounce' back. From the encounters that she relates, her resilience is demonstrable and seems to come from her socialisation and upbringing. She has the ability to find solutions to problems through creative thinking and forward planning.

NK relates an unhappy situation in her family when her husband became "man about town." In traditional African culture male dominance commonly saw women tolerating their husband's adultery. NK explains that she devised a strategy of ignoring her husband, and also disregarding the pain that she felt as a result of his shenanigans. "You know there were times when... you cook nice food and he does not turn up. You worry. I then took a decision that we are all adults and accountable for our lives and I stopped worrying about him because he is enjoying while I am sad."

Through her plan she was able to maintain a stable family. "I ignore him and concentrate on my children and bring them up nicely."

Interestingly, NK was an activist who was also involved in women's emancipation, but she did not challenge her husband or divorce him where there could have been reasonable grounds.

Divorce was not an easy option for most African women. The cultural stigma of having failed in a marriage was a real deterrent to NK. "...can't even think of it [divorce] because it would mean I have failed. And when they scold you they say '*U buya e mwendeni*'<sup>21</sup>..." NK's attitude reveals that she too considers this a women's burden - she had to ensure that the marriage was a success. This demonstrates the impact of socio-cultural values and traditions and how deeply they are entrenched.

The themes relating to learning theories are presented in the table below.

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<sup>21</sup> Derogatory term for a woman who has divorced and not succeeded in her marriage.

**Crisis or not?**

The participants held different views about whether or not they had experienced crises. The term 'crisis' was generally perceived as unfamiliar, in particular to African women. It seemed to conjure up different meanings with negative connotations among three of the five women (KK, NK, FT).

Literature also shows that as we grow, develop and mature we experience situations of pain and joy. Lumsden (1985) refers to this as "gains and losses." These situations may cause tension and disequilibrium which can throw a person into a crisis. Other theorists assert that there is often a tension between what exists/current situation and the transition to the new development. How we respond to the situation is what is important, and Mezirow (1990) highlights the importance of reflecting on experience and interrogating the basis of our assumptions that underlie our world views. The 'crisis' may trigger different responses depending on the level of empowerment through consciousness, reflection and ability to address the problems.

NK's observation is that 'our life perceptions' affect how we view the difficulties that we experience. She holds the outlook that we are the authors of our own destinies. She is an ardent Christian and that appears to be the source of her strength and helps to shape her positive attitude towards her problems.

NK experienced what she can confidently describe as a 'crisis' when her brother died. It seems that, to her, a crisis is when she is completely helpless to change a situation: "Death is final. When it happens there is nothing we humans can do but accept."

FT associates midlife crisis with European males. "I associate that with white men because they are the ones who change drastically and buy sports cars, go out with younger women etc."

She reiterates that women experience physical changes linked to ageing but attitude and one's mental state are important in dealing with this. FT believes that she has internal control of her life. This sentiment, echoed by NK, promotes the belief that we have the personal strength and choice to positively shape our lives. "Age does not mean you must be dead - I am not dead inside. I continue to appreciate life and its good things. For me it is growing up and not a crisis - it is in my hands, in my power to determine the life that I want."

MR is uncertain about her experience of crisis. "I don't know, but I can tell you that I have changed a lot since I became fifty...For me it is about fulfilling what I want." She has become more assertive and less dependent on others. She has abandoned her tendency of accepting situations and become more determined.

KM explains two crises in her life. One was trying to adjust to a new work environment that was bureaucratic and extremely stifling. She claims that she was forced to resign: "They were manipulating my post. There were many work dynamics which made the job stressful and not worthwhile."

She began to question and doubt her decision to join local government. More important is her sense of disappointment at the ineptness of leadership and the inability to implement service delivery. This probably ties in with being a child of the struggle, winning freedom and not wishing to watch opportunities for achievements being squandered.

The second crisis was the stress and turmoil she underwent due to with her son's mental illness and his death.

KK believes that women do not experience a midlife crisis because they have the capacity to "bounce back." This demonstrates the power of a women's strength and spirit of resilience, creativity as well as problem-



	<p>solving abilities.</p> <p>The participants, in varying ways, articulate their view on age related 'crisis' in a manner that resonates with positive adult development and transformation learning theory.</p>
<p><b>Critical catalysts for learning</b></p>	<p>Life and work difficulties seemed to have been the critical catalysts that triggered learning for the participants. These problems cover the domestic front and the workplace and affected the women significantly both physically and psychologically.</p> <p>In all five cases learning resulted from the experience of hardship and participants changed their assumptions - to varying degrees - through reflection, reviewing their understanding and finding new meanings.</p> <p>MR found strength and refuge in learning new things. She graduated with both in her M.Ed and PhD when she had problems in her marriage and was going through a divorce. When she was jobless she decided to do a course in ECD. "Learning for me is a way of using my energies positively especially when I face serious difficulties, my books are a welcome diversion at least when I finish I have something to show."</p> <p>KK completed her Masters when she faced turbulence at her school. These challenges forced her to study in order to be reassured about her competence as a leader and improve her self-esteem. "My marks were good and I knew that I was not dumb after all."</p> <p>She is now doing her PhD and is motivated in this by a desire to help ground African children. "I am ...focusing on culture because I am concerned that our education system is lacking and not holistic. I want to leave a legacy. I am very interested in the value systems and how we can infuse [these] into life styles."</p> <p>FT is reading a lot and inquiring from elders about traditions and culture</p>

	<p>because of her new role as <i>Kgadi</i>. She is also motivated by her own feelings of insecurity that she does not know enough about her culture and her own identity.</p> <p>NK is studying a degree in theology. She was motivated by an internal force. “It was not a decision but a spontaneous response to be a spiritual person. God had a purpose for me.” NK is also influenced by significant others, such as Archbishop Tutu, whom she regards as her mentor and role model.</p> <p>Context is important in NK’s understanding of God and the Bible, and further studies help her to achieve higher levels of insight. “Learning and reflecting will help me ...contextualise - make the linkages with real life - and that will happen only through on-going reading and learning.”</p> <p>“I have been trying to understand who I am and what my purpose in life is and I have found myself becoming more and more spiritual.” KM continues to learn. By leaving her ‘comfort zone’ and against the traditional belief, MK pursued other opportunities such as a course in Monitoring and Evaluation to build her competence and confidence as consultant. She has also developed an interest in herbs in order to complement her health background.</p>
<p><b>Being retired and unemployed</b></p>	<p>Studies show that South Africa is currently experiencing elevated levels of unemployment and that it is highest among the youth. Employment is critical in human life, economically and socially, and determines the life style of people. Employment also has a psychological dimension as an essential source of identity, and provides people with feelings of self-worth and self-esteem (du Toit, 2003).</p> <p>Psychologically, unemployed people may suffer from poor self-esteem, loss of status, and loss of social networks. Health may also be affected. A range of negative effects of unemployment is evident in the women of</p>

this study; however the intensity of factors varies among the participants. The positive spin-offs should also be remembered though.

Three participants resigned or took early retirement because they had reached their tolerance threshold in their different employment situations. KK, MR, KM left because the environment was hostile and unbearable.

These participants report similar effects of unemployment - loss of income and anxiety about financial security. Psychological problems were also experienced.

For KK unemployment affected her financial situation negatively but she was relieved to leave. "I was unemployed, my retirement was not planned. It was very disruptive financially. It is okay, I have peace of mind."

FT resigned to establish her own consultancy where she could be innovative and creative but she has experienced profound loneliness. "You...work on your own, unlike in an office where you enjoy the company of colleagues. Social interaction is missing..."

NK took voluntary early retirement because she wanted to study. Her retirement did not have negative results because it was planned. "I wanted quality time – library study, do my assignments and without worrying about the clients at the bank."

MR was overlooked for promotion at work. "... instead people with no knowledge and experience were hired and I had to train them. This happened thrice... I decided to resign it was too much."

MR's story demonstrates the loss of income, lack of dignity provided by work as well as on-going feelings of loneliness. MR's self-esteem was eroded in a job that, she feels, did not recognise or reward her: "When I

	<p>resigned I did not think. I just wanted to get out and away from that frustration of a job. I had had enough.”</p> <p>She was affected psychologically and socially. “I socialise less, maybe I am self-conscious and have a complex because I don’t have a job?”</p> <p>MR has a strong family support system but she also experiences feelings of loneliness. Paradoxically, when she goes to her family home in Soweto she experiences feelings of disconnection which are increased when unemployed women invite her to drink with them.</p> <p>MR is self-employed but she has not managed to secure enough work to sustain her. This frustrates her because she is educated and qualified in her field. She feels that she should find formal employment and she is thinking about using her connections because she is not confident that she can get a job on her own. “Yes now I want to look more aggressively. I am looking to meet someone whom I know and maybe she will help me... and I will really beg, if I have to and ask her to give me a job.”</p> <p>KM mentions that she could not get a job at a government department in spite of feeling that she was a suitable candidate with knowledge and experience. She thinks that age was the barrier. That was her last effort to seek formal employment and she decided that she would develop her consultancy and become self-employed thereafter.</p> <p>KM is happy as a consultant, finding fulfilment in being creative and innovative. “I have no regrets leaving local government.”</p>
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**Conclusion**

From the ‘herstories’ of the five participants it is evident that they have experienced incidents and events which were catalysts for change. These resulted in learning and new ways of approaching their lives. The analysis of the conversations highlighted common themes which

appear to have been influenced by similar experiences such as growing up in the township under *apartheid*, and being schooled and educated under the Bantu Education system. Orlando, Soweto, was the heartbeat of political activity in the 1960s. The 1976 Soweto uprising plunged Bantu Education into a deep crisis until, finally, the ANC was unbanned and the dawn of democracy broke in 1994. These socio-cultural and political events shaped the lives and outlooks of the five women and altered the consciousness of the participants.

The conversations reflected strong evidence of the participants' belief (inculcated by their socialisation) that education and learning had the potential to improve their lives. There are also indications of shifts in thinking that a profession lasts a lifetime. When conditions became unbearable KK, MR and KM left their paying jobs and ventured into self-employment. They took the risk notwithstanding the possible financial difficulties because the work environment tampered with their dignity and health.

Interestingly, cultural beliefs may be more stubborn and difficult to change as demonstrated by NK, who despite being a political and gender activist, did not divorce her husband because of her fear of stigma. FT also reflects on the relevance of tradition but she believes that if rituals are not conducted bad luck may befall the family.

There is further proof of on-going self-directed learning and a belief among the women that they could utilise their qualifications and skills in a different setting and take a risk to make a success of self-employment. There is adequate evidence of the link between self-directed learning and personal development - drawing on the concepts of inner directedness (Riesman, 1950), self-actualisation (Maslow, 1954), locus control (Rotter, 1966) and autonomy (Erickson, 1964).

The findings will be discussed in more detail in Chapter 5 where the emerging themes will be crystallised and linked to the key learning theories of transformational learning, experiential learning and self-directed learning discussed in the literature review.

## CHAPTER 5: DISCUSSION AND CONCLUSIONS

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### ***Introduction***

The overall purpose of this study was to establish if women in the 50-59 age cohort, who were previously employed and are currently retired or unemployed, turned to learning as a life-enriching opportunity post-employment. The study sought to identify the factors that contributed towards retirement being a trigger for learning. This chapter begins with a discussion of the central themes that emerged from an analysis of the conversations with the women in terms of their shifts in meaning schemes that resulted in more inclusive perspectives. The implications of the research results and the research's limitations are then considered before the recommendations - that form the final section - are detailed.

### ***Crisis or not?***

Various theorists assert that as people grow, develop and mature they experience situations of pain and joy. Lumsden (1985) refers to this as "gains and losses," in which ageing becomes a complex phenomenon that takes place within specific contexts. These factors affect the quality of life of the ageing and aged and may cause tension and disequilibrium that can throw a person into a state of crisis.

This crisis is what Jacques (1965) focused on, emphasising that in an older person, it could be triggered by their realisation of "own mortality and change in time frame" from "time since birth" to "time left to live." It should be noted however, that the participants did not dwell on the concept of "time left to live" and felt they still had a contribution to make. Instances of crises in the women's lives reveal that they were triggered by various circumstances across their lifespans. These findings resonate with Lumsden's (1985) exposition and his gains and losses.

Gains and losses occurred within specific socio-cultural, political and economic contexts discussed further in this chapter. One common experience of the near-old women was financial difficulty brought about by the loss of employment and thus income.

The near-old women in this study perceived ageing as a natural process and dismissed the notion that they had suffered an age-induced crisis. One participant reported that how a person aged was linked to their state of mind even if facing age-related ill-health: “For me it is growing up and not a crisis. It is in my hands, in my power to determine the life that I want.”

### ***Meaning-Giving to Retirement***

The theory on positive adult development asserts that human development continues after adolescence and refutes the notion of decline beyond late adolescence postulated by many gerontologists. Mezirow’s transformation theory seems to link nicely with positive adult development:

“Adult development is seen as an adult’s progressively enhanced capacity to validate prior learning through reflective discourse and to act upon the resulting insights.”

(Mezirow, 1991: 7)

All five participants held strong views that even though they had left formal employment they could live positively by engaging in self-employment and being involved in community building activities. The near-old women were able to identify instances of disruption or crisis in their lives that resulted in noteworthy life decisions and changes. These incidents were not age-related but could be described as critical and dramatic instances in the course of life that caused significant pain and stress.

May and Hunter (2003) identified the loss of employment through forced retirement or retrenchment as one of the key risk factors in the lives of the near-old stating that the loss of employment came with a perceived loss of ‘dignity of labour,’ and possible poverty in later years.

Despite these risks, the accumulative effect of unhappiness due to a hostile work environment - for all of the participants but to varying degrees - such as missing out on promotions or being demoted, led them to exit employment. For KK, the hostility experienced as a result of the rebellion against her by the teachers whom she managed became an untenable situation.

Therefore, for this group of near-olds, leaving paid, formal employment or taking early retirement became a conscious choice in order to regain their dignity and health.

Four of the five participants described how they continued to engage in on-going professional development although their competencies were undervalued and unrecognised in their employment settings. They also recognised that they had opportunities to operate consultancy businesses because of the knowledge and skills that they had cultivated over the years. This can be related to what Mezirow (1990 and 1991) describes as transformative learning, which is a process of making new or revised interpretation of the meaning of an experience which guides subsequent understanding, appreciation and action.

The female participants realised that the 'dignity of [their] labour' had been compromised in their work situations. They, thus, revised their interpretation of this by appreciating their worth as well as recognising that their expertise could be better applied in the consultancy world. They made the choice for what Lumsden (1985) describes as the possibility of growing richness in the quality of experience itself, and the "creative freedom" it offered.

One woman felt that her spiritual path was more meaningful to her than staying in an unhealthy work environment. In this setting, despite the financial difficulties that accompanied leaving, two of the women stated that terminating employment had restored their mental and physical health. Two others believed that consultancy work could provide an outlet for their innovation and resourcefulness – instances of 'wisdom' (Erickson, 1978), self-actualisation (Maslow, 1943), individuation (Jung, 1977) and attempting to find happiness (Aristotle).

The participants displayed a positive approach to life and engaged in adult development through continuous learning. There is evidence of community-mindedness such as KK's cultural village that gives her a purpose as she attempts to help ground children in traditions and values. In doing this, she believes that she is pursuing and fulfilling her vocation of being a teacher. KM contributed to social upliftment in the health sectors while FT is engaged in poverty alleviation projects.



Spirituality is further demonstrated by three other women. Individual spirituality is represented by cross-paradigmatic worshipping; training to be a minister who seeks to contextualise preaching in order to make it meaningful to the congregants; and continuous assessment of culture and self-identity.

## ***Retirement as a Critical Catalyst for Learning***

### **Gaining New Knowledge and Skills**

There was ample evidence in the analysis of the conversations that early retirement and unemployment was a trigger or catalyst for learning. As the previous section shows, the near-old women sought to empower themselves with additional skills and knowledge in order to be properly equipped to deal with new work environments. It was evident that the women had developed self-awareness that led them to identify their interests, passions and desires. This is demonstrated across the participant's stories and is exemplified by their desire to contribute in areas such as community and adult development, and social cohesion.

The fact that the near-old women wanted to contribute beyond earning an income, is illustrative of Knowles' (1972) reservoir of experience which acts as the adult learners' living textbook and is central to their learning experience (Kolb, 1984).

### **Life-long learning**

The view held by Brockett and Hiemstra (1991) that life-long learning is not the preserve of formal education but that it takes place across the life span of a human being was confirmed by the participants. The learning took the form of formal, self-financed, short courses and self-study where, in some cases, the women purchased books to read. The participants' learning approach validated concepts such as inner directedness (Riesman, 1950), self-actualisation (Maslow, 1954), internal locus control (Rotter, 1966) and autonomy (Erickson, 1964).

### **Self-directed learning**

The participants in this study can all be described as life-long, self-directed learners. Kasworm (1983), cited by Brockett and Hiemstra (1992), states that self-directed learning can be viewed "as a set of generic finite behaviours, as a belief system reflecting and evolving from a process

of self-initiated learning activity, or as an ideal state of a mature self actualised learner” (Brockett and Hiemstra, 1991:22). Indeed, these near-old women are living examples of this description.

The antecedent to the research subjects’ positive attitude towards learning was a result of their socialisation. The participants all held education in high-esteem from youth. Three of the five women completed their degrees while being employed, married and looking after small children. This satisfies Fellenz’s (1989, 1991) two aspects that self-directed learning is a process and forms personal development, in that the learning occurred over time, and contributed towards professional development. It can thus be concluded that for these women life-long, self-directed learning has been a life pattern.

The culture of learning was important in later years when the participants were faced with challenges such as death, divorce, unbearable conditions at work and loss of employment. All of the women turned to learning when faced with various difficulties. Some used studying as an escape strategy.

The need to be informed, culturally and spiritually, also motivated three of the women. The successful completion and good marks obtained served to affirm the women and bolster their lagging self-confidence. One near-old woman described becoming more assertive and goal-focused. Thus, the experience of successful, part-time study proved to be more meaningful than simply learning and acquiring knowledge and skills.

### ***Instrumental learning and emancipatory learning***

Instrumental learning is largely concerned with mastering the ability to control and manipulate people and situations. It is largely mechanistic, task-oriented and aims to build workplace skills to improve productivity. “Essentially it involves the method of problem-solving, canonised by the natural sciences, that we all use or misuse in learning how to do things,” (Key, 2002: 17).

Four of the women described how leaving work became a trigger for their uptake of instrumental learning in order to enable them to be self-employed. The need for new skills

reflects the ever-present dominance of instrumental learning because of the requirement of skills in the consultancy field, where competition is high (Mezirow, 1991).

Tight (1983) likens emancipatory learning to perspective transformation. Key (2002) sees emancipatory learning as a process of critical self-reflection which may result in identifying distorted meaning perspectives, challenging them and transforming them through a process of critical reflection. This was demonstrated by the near-olds, specifically KK, NK and KM who left their professions overturning the entrenched belief system 'once-a-teacher-always-a-teacher/nurse.' The caveat here is that there were also instances of deeply entrenched cultural norms that were not erased by simple processes of self-reflection.

### ***Perspective Transformation***

Meaning perspectives serve as perceptual and interpretive codes used to make sense of our experiences and situations. These provide a framework for understanding, and perceiving new information. Experience may, therefore, play a key role in strengthening our personal meaning systems by refocusing and extending our expectations about how things ought to be. Getting adults to explore and understand their own perspectives forms the crucial dynamic for transformative learning.

Central to Mezirow's theory on perspective transformation is the individual's interpretation and explanation of their experience, more than the actual event or circumstance. This determines their actions, hopes, contentment and emotional well-being as well their quality of life (Mezirow, 1990 and 1991). In this case, amongst other multiple factors, the women experienced unfavourable work settings. Their responses to the hostile environments were internalised resulting in them leaving. It is interesting to note, however, that none of them attempted to actively fight the system in order to alter the work situations. Thus, it can be said that they released themselves without changing or transforming the factors that created the tension.

Internalisation of the challenges resulted in resignation but that did not lead to transformation of particular employment cultures, such as unfair systems of promotion and grinding

bureaucracy. Extensions of this theme are further revealed in one participant tolerating adultery in an African, patriarchal society. Another participant, having failed to secure consultancy work, stated that she would aggressively search for paid and formal employment. She plans to thus leave the difficulties of the consulting world unchallenged and return to paid-employment.

For the reasons stated above, it is risky to suggest that the near-old women experiences can be sited as instances of radical emancipatory learning as sited by Freire (1972) who insisted on emancipatory learning resulting in liberation from hegemony as an outcome. Mezirow's view sees it as "...emancipation from libidinal, linguistic, epistemic, institutional or environmental forces that limit our options and our rational control over our lives but have been taken for granted or seen as beyond our control," (Mezirow, 1991: 87).

It is interesting to note though that in all of the 'herstories' there seemed to be instances of the women's inability to get a critical view of circumstances, particularly in relation to culture. This is evidence of domestication (Freire, 1972). The women, therefore, remain shackled to 'unconscientisation' (Key, 2011) that serves to entrench the repressive culture of the dominant class. In light of this, the importance of conscientisation (Freire, 1972), critical reflection (Brookfield, 1990) and perspective transformation (Mezirow, 1991 and 1990) cannot be over-emphasised.

All of the near-old women demonstrate a high degree of resilience and resourcefulness that seems to have been dominant behaviour throughout their lives. There is evidence in their narratives that this attitude is shaped by a strong cultural expectation for women to cope, provide and survive. Mezirow (1991) states that culture can either act as a prohibitor or facilitator of transformative thought, thereby discouraging or encouraging it.

The varied descriptions of the women verified that they bounced back from crises. In the African culture sustaining this belief system may play a significant role in maintaining the status quo and prolonging patriarchy by entrenching the way that the African women perceive and

address the predicaments they are forced to face. Because of experience at home, KK was brought up to believe that women anchor the family.

NK an anti-apartheid activist reflected on her husband's unfaithful behaviour and decided that she would not divorce him due to the cultural stigma it carried for an African woman in her society.

FT tussles with assuming the role of the head of the household as the Kgadi. She suspects that she took on the job due to expectations from her socialisation. She grew up in a religious household, yet her belief system tolerates a pluralism in which "rituals are very important to know... they must be carried out. If a person does not... they might have problems which they cannot understand." FT attended university in the United States of America. The contradictions in this well-travelled woman's narrative demonstrate tensions in her meaning schemes that lead back to traditional, deeply embedded, African cultural systems. FT's ambivalence in the Kgadi situation showed that she was attempting to work this out but still has a way to travel before reaching a state of conscientisation.

The cultural, moral and ideological vantage points from which participants' situations were viewed provided meaning schemes or perspectives (Mezirow, 1990 and 1991) that were used to arrive at their own meaning making. The participants showed instances of interpreting experience which resulted in altered meaning making, the significance of which must be recognised in the process of facilitating adult development. Evidence in the research project suggested that, in some instances, experience alone may not have triggered learning as Jarvis (1987) Brookfield (1999) and Erickson (1972) assert. Meaning making from experience often occurs through the blinkers of an embedded socio-cultural context.

### ***Research design***

Ethnomethodology was successfully applied in this research and enabled a free flowing conversation about the topic. It was an iterative process that provided a rich understanding of the 'herstories' of the women and the different levels of transformation that these near-old participants experienced.

The research process also gave the participants an opportunity to reflect on their lives and experience. Some of the participants acknowledged that being given the opportunity to talk about the termination of their working lives was therapeutic.

### ***Research Limitations***

The 50-59 year old cohort is an understudied group with reference to ageing, education and further employment and learning opportunities. There is a dearth of theory relating to the life circumstances of this group, particularly African females, and with respect to adult learning and development within the context of perspective transformation.

A further limitation of the study was that it did not focus on issues of class, race and gender, in order to ensure that the study did not become unwieldy. Further studies might probe how race, class and gender issues impact on learning by near-old adults.

### ***Implications of the Research Results***

It would be of great advantage to the South African knowledge base if longitudinal studies could be undertaken on the issue of the ageing phenomenon and its impact on the quality of life those aged 50-59 years and how transformative learning can help to empower them.

From an adult education perspective it would be beneficial if more resources were allocated to investigate methods to promote positive adult development and transformative learning.

In the context of South Africa, with all its challenges and rapid change, I hope that this project contributes towards discourse, action and advocacy highlighting the value of adult education as a lever for development.

### ***Conclusions***

Evidence presented in this project demonstrated that experience and the ability to reflect critically is a powerful trigger for learning. Furthermore, the study highlighted the importance of closely scrutinising the effects of the socio-cultural, political and economic context on the process of perspective transformation. As adult educators, we cannot glibly speak about

perspective transformation without understanding the complex nature of change which involves cognitive and affective dimensions.

Promoting perspective transformation through carefully planned learning events would be a potent approach to facilitate adult learning. In this way, adults would be provided with the opportunity to critically reflect on their meaning schemes and perspectives with the hope of becoming conscious of their taken-for-granted situations. The philosophy that we hold as educators acts as an important building block for fostering transformative learning.

### ***Recommendations***

The participants described the difficulties in their new self-employment ventures such as lack of seed money, loneliness and the erratic nature of consultancy work. Despite these challenges the women experienced positive spins-off and instances of freedom, problem-solving and creativity. Transformational learning resulted from leaving their jobs.

The Minister of Social Development stated at the launch of the older people's charter in March 2011: "It is my firm belief that our older persons must continue to live purposeful and meaningful lives... and that old age should be a time of new freedom..." (Dlamini, 2011). I contend that, for this to be true, it must be preceded by large-scale rollout of specifically designed adult learning programmes which affirm ageing and highlight possibilities during retirement. These could include harnessing the wisdom and experience of older people with the youth's enthusiasm and energy in mentorship programmes (Daloz, 1986 and Brookfield, 1986 and 1987). Other learning possibilities may include seminars and workshops on becoming self-employed.

This study has conclusively confirmed that the near-old may have retired but they are not tired. I too am an example of a mature, retired, self directed learner and I strongly concur with Hunter and May (2003) that a large number of near-old citizens are still active and productive.

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## APPENDIX A: TRANSCRIPTS

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### INTERVIEW 1: Keketso Kau

1. **INTRODUCTION. I share my own experience and why I chose the topic as well as how I hope it will contribute.**
2. **Please tell me about yourself.**

I am KK 58 years old I am an educator, education consultant. That came by coincidence because I had to leave the education department because of the fact that it was no longer conducive to be there. Kind of pushed out like you because in 1990 I became a principal, just after Mandela was unbanned and the unions, ANC were unbanned-and I became principal on the 01/March, the then NEUSA had a chalks down. And my first meeting was how we manage the chalks down-at a junior primary school it was not like high school where learners can look after themselves.

**The beginning of the crisis:** And the junior primary school teachers were the most oppressed ones in the teaching fraternity, principals were forceful and abusive and now they were letting out steam. There I was having been at deputy principal at high school, achieved as principal and I was very excited but all that went down the drain because people (teachers) were fighting and unwilling to listen. Remember the political organizations wanted to bring down the DET department and we as principals were the ones holding everything together-the school, children and parents and they had to break you as the principal. Principals were chased out of schools-they were the targets and I became very ill, migraine, stress- and that's when I decided to do my Masters in 1991-because my self esteem was down, my personality changed, felt useless, incompetent, I was disillusioned, my dreams were shattered , leadership skills tested- became paranoid, my character changed. Listening was lost and my virtues taken negative, if you are nice, helpful was taken as a sign of weakness.

### 3. **What triggered the Masters?**

I felt that I needed to channel my energy positively, because I was really losing it. And I got good marks. But I asked myself how long I would tolerate the situation, we had a house in Rockville. I tried to get into business I wanted to do other things- I can't wake up and do nothing- I will die. And I thought while I was still sorting myself out, I set up a shop in Brixton.

**Eikenhoff experience** was a replay of my previous school. And I resigned. I was not going to subject myself to that situation. My children did not like it and said that I must resign I resigned but it was not planned. It was a disruptive event which made me sick, had migraine and my children complained saying that I would die and they would be left without a mother. So I

resigned much against my wishes because I really loved my job. A teacher is both an educator and a social parent especially for the children who were needy both materially and learning.

**Professional par excellence.** Passionate and committed. Listens to the children and cancelled them.

Put all my energies into the farm school.

**How I got into the HIV/AIDS arena.** Soul City approached me to pilot the HIV/AIDS programme at my school and the EU launched it there. That helped because when I told Soul City that I was living they invited me to come work for them. Teaching life orientation skills at schools. All over Soweto and I started regaining my confidence.

Then OBE came and the department set up a NGO that policy should be unpacked and simplified for teachers.

**Began to do many things.** Soul City. Ikitsing (Know Yourself) Programme. Involved in training in OBE. Approached by district—opened a consulting company (1999) - Research and development. My MA was on folklore and linked it with the African Renaissance, wrote to SABC and requested to do a programme on folklore and culture.

**Cultural Village.** Got a farm to do perma-farming. Create a cultural village to promote Tswana culture. I am a teacher—that is my purpose. I have gone beyond teaching.

**Midlife Crisis.** What do you/women think? Women do not have a midlife crisis they bounce back. In Tswana we say 'Tshimo ya mosadi e sekgwana.' It means even if there is no mealie meal in the house the children are going to eat- a plan will come. A woman will find something. That is why they say we keep the home fires burning; they will burn even when there is no wood. Women bounce back- maybe we can talk of temporary. Even in your life you can be disillusionment now but as a woman you come up with a plan. Bana ba mosadi will never be orphaned- as woman you come with a plan.

#### **4. Did you find yourself unemployed?**

Yes it was I was unemployed. I got something at SC but it was little sometimes I only did an hour so the money was little, remember I was a principal. I did an hour a week, the pension helped. I said if I can pay off the house and the debts even if I get R1000 it would be ok I could pay the lights and buy food. But also I was lucky because my husband was still working so he covered medical aid. I was unemployed and my retirement was not planned it was very disruptive financially. Remember I had a shop, and I got into debt because of that, I had to take what little money I had to pay debts—it was an era of disillusionment for me, but it was not a crisis.

#### **5. Please recount very briefly the circumstance of leaving employment**

As I said I was asking myself- You know it comes to a point where people make you feel worthless and you doubt your capability, you then start questioning yourself, your leadership skills. You feel really worthless and then you ask yourself how long you will live like that-the paranoia, feelings of worthlessness, self esteem dented. Then you have to decide- so much conflict, no longer objective and life seems miserable, difficulties, changed personality, see negativity in life.

**6. Unemployed opportunity – How did you find them?**

I had to identify opportunities. I had to write to SABC. SC emerged they approached me, and that led to other opportunities in the field. Then I opened my CC. But it does not just come it is your initiative as a woman, I wouldn't have got it if I had not taught guidance- It is the willingness to go out see opportunities and take them. It is your initiative as a woman and being innovative and willingness to see the opportunities

**7. Do you think your studying also helped? Would you say that unemployment and leaving teaching helped you to look at things differently?**

I would not be where I am. The research people take you seriously when they know that you talk sense and you have researched you know what you are talking about. Networking helps. Leaving teaching made me more innovative. You know I always say we like comfort zones, we don't want to take risks, go out there explore and develop our skills. But God pushes you out makes people to push you out to the greener pastures I do not retire. That is why you also say retired but not tired, I feel if you retire you expire. You stop, your mind stops functioning, thinking you wake up to nothing you can rather say you slow down. Retirement forget it.

**8. When you left teaching did you seek employment?**

No, opportunities availed themselves. I was going to look, because when I left there was a package, but I did not take it because I thought with my skills I could still get a job in government.

**9. Have you experienced any major changes in your life as a result of leaving teaching?**

Yes I have become financially independent, I have done things that I would never have done, travelled the world. I had a choice of what to do. Happy now because I moved from having relations at work, now I form connections and it has given me peace of mind.

**10. Any challenges? As a consultant you always have to build networks.**

Now I have a new career am into farming and I have to learn more about farming and gather skills and learn new things. Would I be correct to say that these challenges have triggered your ongoing learning? Yes, definitely now learning about farming, perma-culture, healing and how

they work. This has been possible because I left the comfort zone even though not out of choice. I want to explore/check if you have experienced.

I am currently doing my doctorate and focusing on culture. What triggered that is my concern about our education system is lacking and not holistic. My topic is life long learning as a human development from an indigenous African perspective. I am looking at lifelong learning globally, what does it mean. Am saying lifelong learning from the African perspective will root the child. I am advocating for lifelong learning from the cradle to the grave. I am very interested in the value systems and how we can infuse into life styles.

**1. What would you say were the critical change moments in your life that influenced your life perspective?**

Moving from the comfort zone. As a consultant you work all the time doing research and writing. Setting up my consultancy, developing a curriculum, making it unique.

**INTERVIEW 2: Nontobeko Kente**

2. Introduction. Tell the participant my story, taking early retirement. Reflections and how I started studying. I wondered what women in my position cope and whether they resort to learning as a strategy for coping. My story of early retirement. Moments of reflection and identifying who I am. And I worried about other women in my situation and what they do in their situation. I wondered about how they cope, what they do especially whether they learn new things. Pensionable age is 60. But the grey area of 50-59 yrs.

**3. Please tell me about yourself.**

I am Mandisa Kiwiet, married and a mother of three grown up children. Two are married and the third one is still living with us. I live in Orlando West, Soweto where I grew up. I am a teacher by profession but as you know once a teacher always a teacher, although I joined the corporate world as a banker I have remained a teacher.

**4. Thank you very much for that as I said to you I wanted to know what African women knew about midlife and the midlife crisis, could you then please tell me what do you think about midlife crisis?**

This midlife crisis varies from situation to situation because there are other people who would be affected even before they hit the midlife age. Some people experience difficulties long before they reach forty, and they buckle under the pressure and get into a crisis. They start to drink alcohol or take drugs the next thing the person is an alcoholic, it is very

common here. It is a matter of attitude and how you deal with difficulties and changes in your life. Some people get depressed when they are getting old, the negative attitude is telling her that she is getting old and life is not good. The attitude is a big variable- I had a friend, a woman in Rosebank, she was turning forty and we were to celebrate her birthday, but she was so depressed and kept on saying why me forty years! Now this lady tells us that she knows that she was to turn forty, but she cannot accept it she cannot take it. Instead of thanking God and saying that thank you God for being with me all these years and now I am blessed to reach forty, no, she is denying, she is depressed about the wrinkles and how she is looking. You see it will vary according to your life perspective-life is what you make it is really what you make it. And if you want to be gloomy and stay in a cocoon you will be it is really your choice. And if you its your choice, your making and yet God says here is life enjoy it and be happy. Other people at sixty say I am going on pension what will I do, and stresses and become entangled in this cobweb and get trapped in a web of negativity and misery. Which is why we have more women with diseases. That is why we have a high rates of diseases, High Blood, diabetes because of our life perceptions which are negative. If you go to the clinic, you will find many patients with these diseases and it is really because we stress too much as women, especially us African women. But I believe that you are the author of your life and you can.

**5. Have you ever experienced a difficult situation?**

We read our horoscope-me I am a Sagittarian, am outgoing and you will never see me miserable. In my vocabulary I do not have a disappointment or a crisis because I believe that you must live every day to the fullest be happy, thank God every day for the blessings. Tomorrow may not see you. You know there were times when my husband was a man about town, you cook nice food and he does not turn up you worry. I then took a decision that we are all adults and accountable for our lives and I stopped worrying about him because he is enjoying. My father would say there are two Ws which are destructive- women and wine. Crisis was when my brother died.

**6. Being long-term employed and leaving employment. When you left did you remain unemployed?**

I worked at the bank but I took early retirement because I wanted to study. My study was based on the calling. I wanted quality time – library study, do my assignments and without worrying about the clients at the bank. Worry about home/family chores and then do my studies. You know we were activists. We were involved in the struggle. I was studying theology at that time, I always worshipped before going to meetings. God was calling me, but I was not aware of



this. My focus was on the anti-apartheid struggle. Studying with EET, when I completed my certificate, I graduate and invited all my comrades and they could not believe that I was studying theology. My life was a triangle- struggle, spiritual, corporate and my family.

It was not a decision but a spontaneous response to be a spiritual person, God had a purpose for me. 1994 I continued with my studies and ordained as an Anglican priest.

**7. Why did you leave the Wesbank? When you left Wesbank did you remain unemployed?**

I wanted to pursue my studies and I spent most of my time studying, doing my assignments and I was very happy and excited about the grades I got.

**8. How did you cope financially?**

I did not resign I took early retirement and I continue to get my monthly pay, so I was not financially strained. At the Wesbank when you take early retirement you continue to draw your salary until you reach your retirement age. But struggling with us is something that is always there we make do with what we have, you know we always struggle financially we live from hand to mouth. But I studied, was positively engaged and therefore I never felt the pressure. Financially I did not struggle I took early retirement and I continue to get my salary until my retirement age.

Now I continue to study and I am working with my brother. I have now registered with the University of Pretoria for my theology degree, I am very excited about that.

**9. What is the trigger for your continued study?**

You know Ohara theology is not about “Jesus was born in Jerusalem or that he had eleven disciples” It is history, like we have our own history as SA. I want to study and understand theology in its totality. You know in theology we have history-systematic, ethics- Bishop Tutu would say to me we all are blind and let not the blind lead the people of God. I believe that if I go on learning I will see better and be able to lead and guide the people of God. I will be able to contextualize, make the linkages with real life and that will happen only through ongoing reading and learning. Live quality life.

**10. Now let us talk about life changing experiences. Can you share any if you have?**

I told you that I am an outgoing person but I think it is also because of my studies. I do socialize but it is not like the all hey days. Now I have gone through the transition, where you want to engage with less people not too many and people with a purpose, for example when we study I will say that I am. Another change has been cutting out too many friends and my focus now is work, home and studying, praying and relaxing. From church it is home I come home because I want to be “with me” me and my thoughts, the changes in life. We are from a gregarious

scenario but as I grow I am mature, a granny and responsible to the people of God. I enjoy my peace of mind and meditate.

Also our children are now taking over from us. They do the things that we used to do. All my children are married and only the last one is still at home.

#### **11. How does learning help you?**

Transforming my understanding of theology. Moved from just understanding and cramming the ten commandments. You cannot just learn them and say you have mastered. I have responsibilities to community that I minister to. You must leave by example not only in church but all through your life. A caring citizen who knows how to share, the Sotho say “bana ba motho ba kgaolelana tlhogo ya tsie” (Children of the same mother share). Look at xenophobia and how we respond to them. It is not only about getting a degree but it is about gaining knowledge so that we can make a difference in life-knowledge is power, but others abuse that power. And it is not your power it is God’s power.

### **INTERVIEW 3: Freda Thebe**

#### **1. Introduction.**

I explain the trigger that influenced the choice of the topic. Resulted from own experience and anxieties about my financial well being.

#### **2. Please tell me about yourself.**

I am not retired I resigned from my job because I wanted to be independent and self employed and have been self employed for the last ten years. Also what made me resign was that a new CEO had been appointed and we did not share a common vision about what transformation is and how we should achieve it. But the issues you raise are commonly experienced by black women of 50 and above they are the same as you have just outlined.

#### **3. Thank you very much for that as I said to you I wanted to know what African women knew about midlife and the midlife crisis, could you then please tell me what do you think about midlife crisis? And have you experienced it?**

Midlife crisis has usually been referred to men; women do not really talk about midlife crisis. It is usually men who go into midlife crisis. Although women experience physical changes- biological changes, mental shift in terms of how they perceive themselves and how others perceive them. But usually when I hear midlife crisis I equate that to men because they are the ones who change drastically and buy sports cars, go out with younger women etc. But in terms of me, how my ageing has affected me, I am 53 years, but I do realize that people treat me differently than they did when I was forty. Expectations from family members, friends even strangers have

certain expectation which are associated with age. Unlike when I was thirty, it was different nothing would remind you that you are thirty two unless it was at home, but there are more external things that remind you that you are older- feeling tired and not being excited by small things. I think when you are fifty, sixty even eighty it is a mental state-instead of allowing yourself to enjoy life as you want it. I still am able to appreciate new music, ideas- I am not dead inside I continue to appreciate life and its good things. For me it is growing up and not a crisis-it is in my hands in my power to determine the life that I want.

Ohara: Thank you very much that is an interesting angle. But let me explain from my side. I was looking at the age group between 50-59 and also when I look I find that it is a grey area. Sometimes the workplace squeezes you out, and yet you are not of pensionable age, but you still are not employable because of your age.

**4. Ok let us talk about your employment when and under what circumstances, did you leave your job?**

My last formal employment was at the South African National Parks, in 1999 where I was head of transformation. When I took the job I said I would work for two years because it was an emotionally taxing exercise, but after two years I realized that there was still a lot that needed to be done and I extended my stay by a year. When I left the people were not happy because they said that I was living just when they were enjoying the transformation. I left because I thought I had achieved what I set out for myself. But also the new head of the SANP had a different vision which was not what I understood transformation to be. When I left I decided that I wanted to start my own business where I would have the freedom to be creative in projects choice-my specialty is in social and economic development- job creation, poverty alleviation and I felt that with the knowledge and passion that I have I could contribute, working for myself.

**5. And how did you experience that transition towards self-employment?**

Its when you get a contract, the size and the amount which will assist to sustain you over a period of time. The biggest challenge is when you write proposals every week and nothing comes of them.

Another challenge is that you work from home, you work alone, you have your own space but it really becomes lonely.

**6. Please explain that 'lonely'.**

You wake up you work on your own, unlike in an office where you enjoy the company of colleagues. Social interaction is missing, you are at home and you are alone. It has to be arranged.

**7. What opportunities and/or assistance do they think is available to them? Have they pursued these avenues?**

I think opportunities are there but I am not very good at marketing myself. I have a product and a brochure and when people look at my brochure they are impressed with it but I am not good at marketing. Or some people who have surfed the web call me say they are interested in what I am doing but it ends there.

There is no assistance or support you are on your own. If there are people doing similar work it is competition, it is not an easy field to go into, unlike if I had a franchise, consultancy is very competitive.

**8. I am thinking about your own personal feelings about self-employment? Have you ever sought employment?**

Only recently-last year because it is tough financially, I thought of getting full time employment but I have not been aggressive.

Have you experienced any major changes recently in their life? Work? Family? Any thing else? What were these changes? Have these made them change their mind, feelings or point of view about anything? Does retirement trigger learning? Perspective transformation? Whether they have thought of taking up further learning or training? If so why? If not, why not?

My mother passed away recently and being the eldest I felt that most of the burden is on my shoulders-how we take care of the family, family rituals, marriage-my brother got married last year and I had a key responsibility as the family eldest. I did not have financial resources but I had to ensure that the wedding takes place.

**9. Has that changed how you think about life?**

Yes the passing of my mother has had a profound impact, to ensure that the family unit is intact, Supporting and loving each other- that is a huge responsibility, whether I have put it on myself or whether society expects me to do it, it is a huge one. Yes it was a major responsibility and complicated by the fact that the sibling are not children they are adults. They are adults they need support, which they received from our mother. Is this cultural? Not sure if it is African, but in the Sepedi tradition you are given the title that you are the "Kgadi" and that comes with huge responsibilities and if you are a Kgadi those responsibilities are yours. For example when my brother got married I was the one to receive my sister-in-law, orientated her and teach her about our ways, the family rituals etc.

**10. Have these changes triggered any form of learning new things?**

The past two years I have been trying to understand who I am and what my purpose in life is, and I have found myself becoming more and more spiritual. Although I don't go to church I have

picked one author who helps me to understand the world better without taking me away from my Christian beliefs. In terms of work, the type of work that I do requires me to do research, every project that I undertake requires me to continuously learn and I also update myself in terms of skills and understanding the technical terms, legislation and policies and how government works. I have to be current all the time as I cannot depend on what I learned ten years ago. That is self-directed learning you have to buy books to see what the new approaches and jargon, because people also judge you according to what you say. Private and public sectors use different jargon. Continuous learning is therefore a must and I achieve that through buying and reading books. I do all the learning by myself although there are times when I identify courses that I would like to take but because of financial constraints I am not able to.

#### **INTERVIEW 4: Mapula Rathebe**

##### **1. WHAT DOES WOMEN MIDLIFE CRISIS MEAN TO YOU?**

I don't know if I have experienced midlife crisis. But I can tell you that I have changed a lot since I became fifty. When I want something I do all I can to get it, for me it is about fulfilling what I want. If I want to go to Cape Town, and I ask someone to take me there and the dilly dally, I simply call a taxi and go to the ORT for my flight and off to CT. Before I used to beg and beg and if I get disappointed it was ok. Maybe that is the change and perhaps the midlife crisis, I do not know.

##### **2. WHEN AND UNDER WHAT CIRCUMSTANCES DID YOU LEAVE YOUR JOB?**

I left my job, I resigned in 2008, in January? February. I resigned because I was very frustrated with the process and pace of promotions in the department. I started the Adult in the department but I was never promoted, instead people with no knowledge and experience, and were younger were hired and I had to train them. This happened thrice on the third time I decided to resign it was too much.

##### **3. WHAT DIFFICULTIES, IF ANY, HAVE YOU EXPERIENCED SINCE YOU LEFT YOUR JOB?** Initially I did not have any problems because I had a project which I worked on in Namibia I also had other projects.

##### **4. WHAT OPPORTUNITIES AND/OR ASSISTANCE IS AVAILABLE .TO THEM? HAVE YOU PURSUED ANY? There are opportunities but it depends on who you know less so your skills.**

##### **5. WHAT HAVE YOU DONE SINCE BECOMING UNEMPLOYED? I did not feel unemployed initially because I had a project that I worked on in Namibia, after I resigned in 2008. So I had something to do. Also I had other projects with the Tukkies**

and UNISA although not as well paying as my job, compared to my job as Deputy Director the pay is not that much. So I have to make means to patch, I manage but it is a struggle.

**6. HOW DO YOU FEEL ABOUT BEING UNEMPLOYED?**

When I resigned I did not think, I just wanted to get out and away from that frustration of a job, I had had enough. Fortunately I had the Namibia project.

**7. DO YOU EXPERIENCE ANY DIFFICULTY/IES SINCE BEING UNEMPLOYED?** The challenge is always funds and trying to make ends meet. But I also have supportive brothers, I am the only girl at home. When I need food I go to my brother in Soweto or in Benoni.

The main challenge is being alone- you know sometimes I go to my home in Mofolo, my brother lives there. And those unemployed women in the township when they see me they think I am one of them and in the afternoon they would say to me let's get a 'set'. A set is township for three beers, which when you buy you get a discount. They do nothing else but drink the 'set', get drunk and that is their way of life. When I say to them let us run some workshops to empower them, they do not know what I am talking about.

When I am at my house in Waterkloof, again it is very lonely, who do you talk to in the suburbs? I don't even know my neighbours, their surnames and we do not interact-I can tell you it is very lonely in the suburbs

**8. WHAT DO YOU DO SINCE LEAVING YOUR JOB?**

**9. HAVE YOU SOUGHT ANY EMPLOYMENT? PROBE.** Yes now I want to look more aggressively. I am looking to meet .someone at ??? and I will really beg, if I have to and ask her to give me a job.

**10. HAVE YOU EXPERIENCED ANY CHANGES RECENTLY IN YOUR LIFE? PROBE FAMILY, WORK.**

Yes I have. I have already told you about my change in terms of being determined and getting what I want. But also I used to be a great shopaholic. I would go into Spitz and buys more than one pair of shoes, I liked expensive shoes. Clothes I do not mind even if they are less expensive, I am happy to buy from Woollies, even though I had an account at Shirley's. I don't do that anymore maybe it is because of my financial situation. I also don't go to church like I used to and I socialise less, maybe I am self conscious and have a complex because I don't have a job

**11. HAVE YOU THOUGHT OF TAKING UP LEARNING OR TRAINING AS A COPING STRATEGY?** I am continuously learning in the projects I do. I have not taken up any

formal course. But you know I have a PhD and I did that when I had problems with my husband even my M.Ed I did during difficult times – learning for me is a way of using my energies positively especially when I face serious difficulties, my books are a welcome diversion at least when I finish I have something to show. And of course when you learn you grow and develop and see life from a different perspective.

**We have reached the end of the discussion, thank you very much. As I said in the introduction I will send you the transcript for your comments and to ensure that I have recorded the discussion correctly. Once more thank you for giving me your time.**

#### **INTERVIEW 5: Khosi Moloi**

Introduction: Research Project for M.Ed. Topic influenced by my own experience of leaving work abruptly in a very disruptive way. Wondered what other women did in my situation. Concerns were mainly about financial, what I find meaning beyond my formal employment. Midlife crisis? Learning as a strategy? Other means of coping?

#### **Please tell me about yourself.**

I am KM had a career as a nurse from high school I went for nursing, qualified and went on to study with UNISA, doing a B.Cur, I was very young and I asked myself what opportunities I would have in a big hospital such as Baragwanath, there is no young matron. It would be long time before I reached that stage. I then did primary health care in order to arm myself even when I left the hospital. I got my diploma with a distinction-in primary health care. I was attracted to a course in epidemiology because of the influence of my research lecturer. I belonged to the SAHWCO. I moved out of the hospital and joined the university of Wits where I developed my epidemiology until I attained my Masters. I continued as a lecturer and moved to the Institute of Medical Research as a researcher. Started the women and empowerment project.

Recruited and headhunted by the Ekurhuleni Mayor to develop programmes. I joined the municipality on a five year contract in 2001. I was the community liaison director responsible for projects and mayoral projects. Did a situational analysis in order to understand what we planned for.

#### **Midlife crisis.**

**What midlife crisis, what do you mean? Ohara explains.**

**MK:** Like I said the first crisis was the new work environment, a bureaucracy which was extremely stifling even if you had an idea, you have to go through a whole line to get approval. And professionally I had I could not implement my ideas because I was office-bound and was the middle man between to the mayor's office, the working environment had changed.

That was in 2006, I also had the turmoil with my son's illness, had bi-polar mood change. I find your topic very interesting because I was forced to retire, there were lots of employment dynamics. They wanted to get rid of rid post, they downgraded the post and they wanted me to continue at a junior level and I refused. The EHR informed me that the conditions and salary was lower she was honest with me and I decided that I would not stay. The downgrading of the post made me realise that I could be happy working in such a hostile environment, even though the salary was good, very good I decided I could not be where I was not wanted.

I believed that I still had a future even if I left Ekurhuleni, yes I retired but I was not tired. After leaving I revived my consultancy which I had started when I left NPPHC looked for jobs and got a contract with the department of health to evaluate their VCT sites.

What difficulties and challenges...?

For the contract to kick off I had to have funding to pay the interviewers. I struggled to get my last trench. The contract has not been fully paid, an amount of r600.66 is outstanding.

After that I had a dry period of seven months and I decided to do an M&E course with the University of Pretoria. In my last month I got invited to an interview for a post, programme managers post for the priority districts health project. I was lucky to be one of the lucky two people who were appointed as a consultant.

**Why did you do the M&E course?** I wanted the skill because I think it is very important there are many projects that are implemented without any consideration of monitoring n evaluation it is a big mistake, to evaluate at the end of the project. M&E emphasises that M&E is an integral part of the project planning.

**HOW MUCH DID YOU SPEND?** R14 000



**You don't think you are too old to learn?** No there is no age for learning, it happens all the time. It was very useful and after seven months of dryness I took the risk knowing that I am up skilling myself and use my time positively.

**Are there any opportunities for people like ourselves?** You know when you are close to sixty, it doesn't matter what your CV says, people always doubt you and think that you are tired. There is an assumption that you are tired and you will soon be 'leaving' them. The only place that appreciates elderly are academic institutions. There is no retirement, you retire at the retirement age in order to get your benefits but professionally, professors, the older you become the more valued, considered wise and knowledgeable in the field- like Tobias, Mc Gregor, Levin-it is their time to excel. In other sectors you have to move on and give space to the younger ones. I applied for a post in social development and I thought this one is for me when I read the job description but I did not get the post. I did not get it I think because of my age.

**But How do you feel about not being employed?** I have no regrets. I had contract work for two years, it started as a six month post but it ended up being two years. Then I had another opportunity in a consultative process of a health project but the biggest challenge is funding for NGO work. Leadership capacity is also in short supply.

**Have you experienced any changes which have made you to think differently about life?**

Yes physical changes- my hair, sore knees.

Socially though I am not as mobile as I used to be. I feel much better, the work is much more rewarding because I have the space for innovation and creativity. My children are grown up my son has three kids, my adopted daughter has a son but I lost one son...

Spiritual reawakening- What triggered that? Pain. My son lost his head/mind/madness- I never had a true reflection of what losing you head is when I was grappling with this stranger, and I question why it had to happen to my child. He was a stranger and all of a sudden he was depressed withdrawn, mood swings aggression- it took its toll on the family. In that depressed state someone approached me for prayers and I have never looked back. I accept things that I cannot change and turn negatives to positives to reenergize myself.

Has your retirement triggered learning? Yes I have already alluded to that I said during my dry period I said I cannot stay home and dust cobwebs, I said let me do something with my time revamp my energy and skills and did the M&E. And spiritually I read a lot

and have a deeper understanding beyond just going to church every Sunday, I have a deeper and better understanding. I know that being a Christian does not mean things will always be cosy for you. I know that even gold has to go through the furnace before it can become beautiful and shiny.

**You spoke about your interest in herbs?**

Very interesting it started with a herb called comfrey and I read more about herbs and as a professional I know that the medicines that we take have toxic effect on our bodies and I now use more natural herbs. I am reading Margaret Roberts I am having an interest in herbs and its value.