

EDUCATION IN LATE LIFE AS THE COMPONENT OF SOCIAL ADAPTATION OF OLDER ADULTS: EUROPEAN AND AMERICAN EXPERIENCE

Abstract

The article analyzes the main trends in the global demographic processes especially in Europe and the United States, which are characterized by the rapid population ageing. Such demographic situation has risen the political, economic and social challenges for the society. The article emphasizes on the need to ensure social adaptation of older people and the preservation of human capital. It is stressed the importance of education as a way of further development and self-realization in post-retirement period as well as social inclusion and continuation of active life position of older adults. The study of knowledge and experience of Europe and the United States on the implementation of educational programs for older adults may become an important source of its positive ideas for the formation of the concept of older adult education in Ukraine.

Keywords: population aging, older adults, lifelong learning, educational programs for older adults.

Rapid population aging in developed countries has led to the rethinking of older adults' role in the society. Challenges associated with the impact of demographic, economic and social factors call for social adaptation and re-adaptation of older people as well as their social integration in order to preserve human potential. An effective way to maintain social activity of older adults and improve the quality of life in post-retirement phase which includes physical and mental activity, social inclusion, opportunity for further personal development and fulfillment, and independence in later life, is education. Nowadays, education in late life is considered as one of the key instruments of social and economic progress and the development of intellectual potential of any country.

In many countries, the development of older adult education (education of the people of the third age) is not only a challenge, but, above all, is the result of the growing influence of demographic and social factors on the real picture of the world. The special significance of learning in late life is caused by the transition from the concept of "education for a lifetime" to the concept of "lifelong education", which is a characteristic feature of the system of education in the information society. In present days, the growing age group of elderly people needs to be ensured the adaptation to rapid economic and social change. For every country it is important to contribute to overcoming the problems of loneliness, "unnecessity", and social isolation.

Education is one of the significant factors of social progress and intellectual potential of any country. Thus, encouraging older adults to educational activity should become one of the strategic directions of the state policy.

However, the analysis of the educational activity of older people in Ukraine suggests that the development of this area is too slow; modern legislative basis has

not been worked out yet; the opportunities of social partnership are not used. For Ukraine, it is necessary to realize the potential of older adults for socio-economic development of the country. General trends of education of old age people in developed countries as well as the international studies on educational gerontology are of a great interest among Ukrainian researchers. In present days, the experience of the developed countries in the area of education of older people is of considerable interest and can be an important source of comprehensive understanding and creative use of its leading ideas.

Educational Gerontology as the area of research study has been developed in the works of European and American researchers. In particular, the conceptual principles of education of old age people have been substantiated in the researches of W. Bachmann, O. Bollnov, F. Williamson, C. James, F. Kehrer, P. Laslett, A. Lemieux, H. McClusky, M. Mann, G. Mieskes, K. Percy, D. Peterson, W. Sadler, R. Swindell, A. Zych; psychological foundation of education in the third age has been analysed by W. Withnal, D. Garvin, E. Erikson, J. Carter, D. Katz, J. Kohen, E. Miles, B. Marshall, E. Schneider; the models of gerontological education and the approach to education of the third age people have been studied in the researches of P. Baltes, C. Handy, A. Heller, F. Clark, C. Rafman, M. Seaman, M. Famosa; the problems of organizing and running of universities for people of the third age have been illustrated by J. Cowdel, D. Martin, J. Thompson, T. Townsend, R. Swindell and others.

The theoretical interpretation of the subject and sense of education for old age people has begun in the middle 70th of XX century. It was the first stage of educational gerontology, which determined its main target: to instruct old age people how to help themselves during hard life periods, how to be an active member of community and still have a strong hold over their life (H. McClusky). Other interpretations of education of older adults / third age people emphasize on striving for independence: learning of the third agers is the process of self-development, self-realization and receiving some new experience (B. Groombridge). Learning in late life is viewed as the activity that affords opportunity to control their own lives; also it is considered as the emancipation process, in some way, as old people will be able to cope with their problems themselves, shift for themselves, and to be inaccessible to another's will [1].

Recently, the craving for independence is supposed as a prevailing tendency in education of the third age people. On the one hand, this tendency arose on the bases of theoretical gerontology that declares individual's activity; on the other hand, it was a result of social costs reduction in most countries. Independence under present-day conditions should be associated with an individual's sustainable development.

Under present-day conditions, the context for lifelong learning programs is changing, presenting us both opportunities and challenges that are new in human development. A change in the structure of life course has been emerging as the result of rising human life expectancy. Moreover, that rise is one of the most amazing facts in modern history (W. Sadler) [10].

During the 20th century, most developed nations experienced a longevity revolution. In the USA the average life expectancy increased from 47.3 in 1900 to

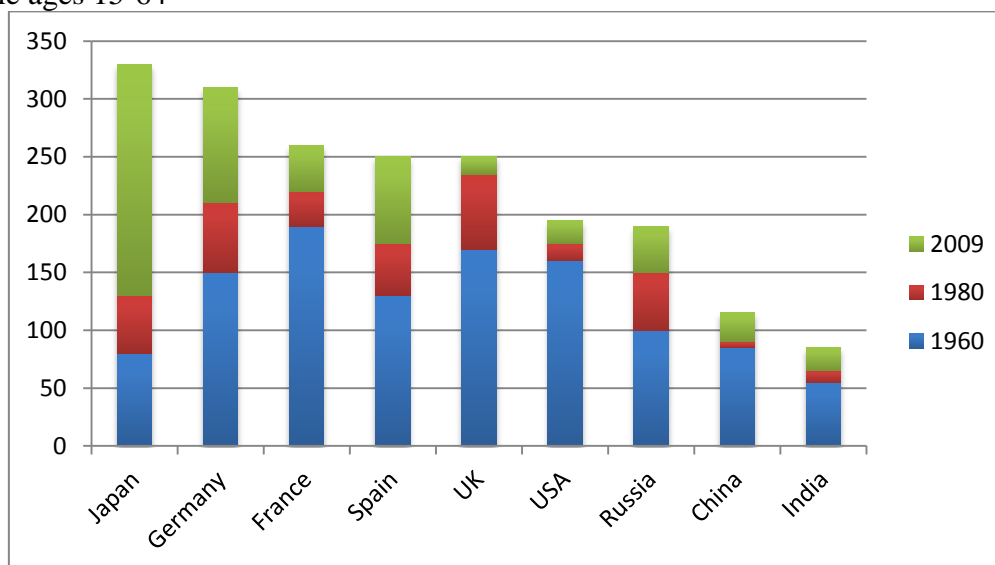
77.5 in 2000 (J. Treas) [12]. In the United States today there are three million people over 85 and it is predicted the figure will be thirty million by 2050 [9].

According to UNO, the average life expectancy has increased about 30 years since 1950 and at the beginning of 20th century makes 68. People live the longest lives in Scandinavian countries and in Australia (over 80), West European countries, Japan, New Zealand, and Canada (over 78). In East European countries the average figure is 74, and in Ukraine – 69 [4].

Social, economic and cultural changes of the 20th century facilitated the rise of living standards, the improving of medical care that influenced upon significant increase of life expectancy. The increasing old-age population ratio occurs at the demographic level in many countries. The vital senility threshold (according to the demographers of UNO, it makes 7% of all 65-year old people and over, in comparison with the total population, or 12% of all 60-year old people and over, according to Polish demographer Rosset, 1959) was first overdrawn by France (1870), then Great Britain (1931), Germany (1937), the USA (1940), and Poland (1967) [15].

According to “The Economist”, continued increases in longevity will ensure that the old-age dependency ratio, which measures the number of elderly people as a share of those of working age, will rise sharply in most countries over the next 40 years, according to the European Commission. The highest absolute increase will be in Japan, where the ratios of 35.1% in 2010, already the world’s highest, will more than double, to 73.8%, by 2050. At that point, the number of pensioners in China will be equivalent to 38.8% of its labour force, up from 11.6% in 2010. The European Union, which had 84.6m elderly people last year, will have 148.4m in 2050. In addition, the ratio for the world as a whole will reach 25.4%, up from 11.7% in 2010. [9]. A chart below shows the significant increase in the old-age dependency ratio or the ratio of people age 65 and over to the working age population ages 15-64, during the period of 1960-1980-2009.

Chart 1. Old-age dependency ratio by country: People age 65 and older as a percentage of People ages 15-64



Source: Global Sherpa: Internationalisation, Global Development and World Rankings from a Positive, Comparative Perspective: www.globalsherpa.org

A major question for individuals, institutions, and societies is what to do with those extra years? According to W. Sadler, if we follow the usual decrement model of aging, the extra time could be spent experiencing decline, degeneration, disabilities, disease, and dependency that have defined usual aging up until now. People positively changing their lives after fifty are pushing scientists to redefine the second half of life and aging (W. Sadler) [10].

The Third Age (from 50 to 75 years) has usually denoted a time of retirement. Researchers have discovered that the Third Age presents us with new possibilities in the life course, which are of great importance to both individuals and society, stimulating the development of lifelong learning programs. People in their 50s are changing course to move towards new life peaks. This new trajectory in their life course is often called “the second growth”, a process of renewal that transforms aging in the Third Age – a season in search of purpose, an era for extended self-realization (A. Freedman) [2].

Many prominent researches believe that how people age is determined not so much by their genes but by the way they live that includes an opportunity for second growth, and is closely associated with lifelong learning. According to D. Garvin, people, whose lives illustrate growth, have been committed learners. They have been learning more about themselves, about opportunities and challenges, exploring new areas, and gaining new skills [3]. Their learning has not been just mental stimulation with an accumulation of information. Strategic learning includes gathering information, interpreting it, and then applying learning to new behaviors – the way they work and live [10].

It follows that a socially adopted person being on a pension, is a socially active person who acts under his/her own steam, who leads his/her life, making full use of his/her personal and professional experience and intellectual potential. Both civic society institutions and private educational sector can guarantee the opportunities for gaining extra competence by people of the third age and developing their motivation for learning activity. Both international knowledge and special features of national gerontological education should be taken into consideration to create the right educational conceptions and models of learning in retirement.

Education of old age people has been developed on the adult education basis. One of the first researches on adults' activity in the USA showed that old age people participated in many educational events. Therefore, after some time most learning programs for adults were modified by introduction of special subjects for older adults. In Japan, special classes for old age people made a perfect start in 1960th. Organizations, which acted within Japanese system of education, offered various programs, from solving the question of municipal service treatment to teaching women and nursing mothers. In 1965, the government committed local authorities to develop the system of continuing education for elders, which has regularly acted since 1980.

Public universities in Scandinavia are engaged in the education of elder people, for example, the Public universities in Finland have been teaching for all comers for over 60 years, offering so-called academies for old aged people. In Denmark and Sweden, the responsibility for education of elders is upon both Public universities and

special universities for people in retirement. They take funds from the Department of Education, local authorities, and physical bodies.

In the Netherlands many organizations, which are engaged in adult education, cooperate with industrial enterprises and service sector within the project “Retirement in Perspective”, which aim is giving the opportunity for education of the people in retirement.

In conformity with the Department of Education, the courses for old age people were organized in Italy with the view of educational attainment compensation. However, not many people have been involved in these programs.

In France, there are three areas of adult education: social and cultural, which was formed of the traditional rural learning; the area of educational activity of labor unions; and the area of occupational training, which has been grown rapidly for the last 20 years. The emphasis is made upon the development of continuing education of disabled people and people in retirement and was professional-oriented as well.

The rural general universities were popular in Poland, offering learning opportunities for three generations. In 1960-70s, first universities for people in retirement appeared and became a place of learning entertainment. The social conditions of old age people and learning opportunities for them were widely discussed in the programs offered in such types of institutions [19].

Soon, in 1970s first specialized institutions for education of the people of the third age (Universities of the Third Age) started their work. They included learning courses, workshops, and educational programs – some new forms of working with older people, which were directed to the responsiveness and mental activity of elderly people, supporting their good physical condition and ability to live at home without outside assistance [17].

According to J. Poltuzhytski, lifelong education in accordance with the principle of permanence in adult education covers whole adulthood of a person including both retirement and pre-retirement age, which are fully withdrawn a guardianship [15].

Universities of the Third Age (U3A) provide learning opportunities for older adults who are largely free of work and family responsibilities. Worldwide, they typically exist in two forms: the French model, based on the first U3A funded by professor Pierre Vella in 1973 in Toulouse, they offer mostly formal courses; and the British model arising in Cambridge in 1981, emphasizes informal, autonomous self-help groups in which the instructors are usually third-agers themselves, not college professors [6].

It was a broad social context to favor the development of U3As in full swing of mass youth movements. In France, for example, the attraction of third-agers in universities was a stabilizing factor. One more reason for the development of U3As in the country was a high employment factor at universities. Since third-agers pay for learning, the problem of professors-students ratio could be solved. However, the main reason for the development of U3As was a demographic factor. Universities of the Third Age have been emerged as the result of rising human life expectancy and the increasing number of old age people.

There was the different type of U3As in the United Kingdom. As it turned out, old-aged people could organize and hold classes by themselves, using their previous

knowledge and practical experience. In 1983, the Third Age Association was founded; and in 1995, there were 266 universities of the UK linked by that organization. Learning in such universities is considered in a wide spectrum of activities – from gymnastic exercises to social work, with a view to improve the quality of third-agers' life. British universities of the third age function on the financial support of the members themselves.

In the United States and Canada, the form exists as Institutes of Learning in Retirement (ILR), begun in 1962 in New York. The Elderhostel (Road Scholar since 2011) Learning Network links most of the ILRs. Like the British model, ILRs are community based and often member conducted; like the French model, many are affiliated with colleges and universities [6]. The main purpose of Elderhostel was creating some new opportunities for rational and efficient life of old age people in society. The programs combined studying, travelling, and adventures, thereby supporting education, self-education, and communication with other people. The first Elderhostel program was realized in 1975 at the University of New Hampshire.

That University of the Third Age or Institute for Learning in Retirement is a growing phenomenon, which reflects the demographic trend of more people living longer, healthier lives. They also reflects several educational trends: participation is strongly linked to prior education; they are communities of learners without distinctions between teachers and learners; and the global networking made possible by the Internet is enabling the participation of homebound, frail, or geographically isolated elders.

Retrospective analysis of scientific publications on gerontological education indicates two models of U3As: the French model, and the British model, specified by R. Swindell and J. Thompson in 1995; but in 2005 J.-L. Lévesque identified five types/models of Universities of the Third Age.

1. *West European model, or "Vellas"*, which is closely linked to a host university; the U3As are affiliated with colleges and universities. The learning programs are realized by lectures or group-studies and are held by staff professors of the university, former professors or visiting professors who are experts in the field of knowledge. The third age students do not participate in curricula designing and choosing lecture subjects, they are just invited to attend classes organized by the institution.
2. *Anglo-Saxon model*, designed by P. Lasslett and E. Midwinter according to two main principles:
 - The principle of the third age: U3As are opened for all people in their post-professional and post-family period of life; the third age students are also expected to popularize the importance of lifelong education and positive aspects of learning in the third age.
 - The principle of learning self-organizing: the universities offer informal courses in self-help groups in which the instructors are usually third age students themselves, tutors and geragogs, without traditional distinctions between teachers and learners. Students are active participants of education process. The third-agers' wishes are the only criteria of what to learn and how to make progress [7].

3. *French-Language North American model* is linked to a university to a certain extent and it is a combination of two previous models. Faculty of the university and former or visiting professors holds the lectures. The most popular forms of learning are practices, group discussions and debates, workshops, and excursions. Students participate in curricula designing, choosing lecturers and experts, and planning of their activities. Both the university administration and the students association realize the university management.
4. *South American model* is very close to West European one but it is characterized by two features: the relation to a host university is required, and the concern for education of the third age people, including low-income groups, is a responsibility of all people who live in the country.
5. *Chinese model* offers various forms of education – from some basic instructions to a high-level professional training. The emphases are made upon the civic rights, cultural consolidation (knowledge, traditional arts, philosophy), and healthy life-style [11, p. 429].

The United States has a long history of older adult education and, therefore, the experience of creation and functioning of relevant educational programs. The main tasks of older adult education in the USA are formed according to the process of global economic and social issues. Learning in late life is defined primarily as a way to self-realization and self-identity of older persons, and as a means of their social protection, adaptation and re-adaptation. Under the conditions of rapid economic and social changes, the constant expansion and enrichment of the system of universal and national values and ideals, respectively, can be realized only if human development is provided.

Thousands of US colleges and universities (at the initiative of Harvard University) opened educational programs for retiree and offered official learning courses, creating a new direction in approaches to education for older people – “the audience without walls.” Therefore, education of older people in the US is more formal, combining three components of older adult education: learning, leisure and travel.

Formal and academic (at universities and colleges) educational programs for older adults in the United States began in 1962 when the New School for Social Research in New York opened the first Institute for Retired Professionals (IRP), which gave a boost to the Institute for Learning in Retirement Institute (LRI). During the 1960-70’s, such institutions were opened at many US colleges and universities, including Harvard University, University of Syracuse, Duke University and others. In the mid-1980s there were more than 50 LRIs in the USA.

One of the largest organizations that deals with education of older people in the United States is Elderhostel (“Road Scholar” since 2011). It was established in 1975 on the basis of the European concept “pensioners at campus” combining learning, leisure and travel. The main objective of the Elderhostel program is to overcome social exclusion and isolation of retired persons. The original program covered five colleges in New Hampshire, but in 1977 Elderhostel became an independent nonprofit organization with the public office. From 1975 to the mid-1980s, colleges

and universities sponsored Elderhostel. In 1989 Elderhostel has formed a network of institutions Elderhostel (Elderhostel Institute Network) and expanded educational programs for retiree in all states, and by 2000 there were more than 200 such institutions in the USA [8]. Since 2000 Elderhostel has organized Lifelong Learning Institutes (LLIs) at colleges and universities, which combine academic non-degree education and travel. Today in the USA there are more than 450 such institutions held by local budgets or the universities themselves [13]. There are not compulsory courses at Lifelong Learning Institutes. The participants themselves can choose a program and the courses to be taught. This is with a view to attracting more people into the educational process, increasing responsibility for their learning and stimulating critical approach to it. In addition, the participants can be involved in teaching, and learning in campus is combined with attending cultural events and traveling. Some studies prove that Elderhostel attracts a certain type of older people: the participants of the programs are mostly about sixty, well-educated, active and with average incomes, and they are motivated learners [14, p. 18].

According to the US National Center for Education Statistics, about 30 percent of older Americans are involved in educational programs of colleges and universities [13]. In particular, the “young old” persons (55-64 years) usually choose courses related to professional activities and courses of their own interest.

Several researches in the USA illustrate that 39% of the old age people are motivated to study by the pragmatic reasons, and for 61% of people the expressive factors are prevailing. Thirty-seven percent of the respondents say they have much free time, but 41% of older people have no hobbies. Most of the old age people wish to study medicine basis and healthy life-style (34%), law basis and social legislative (5.7%), decorative and applied arts (12.3%), foreign languages (8.4%). The interpersonal relations (41%) and gaining of new knowledge (18%) were designated by the respondents as the main reasons for continuing education by elder people [3].

In conclusion, we can state that active longevity of old age people is stimulated by many factors. The individual growth as a sociable, active and creative personality can be considered as the essential pre-condition for the life quality of older people. Education is of a primary importance in this process because it can enable the conscious self-regulation of the lifestyle and life activity of older adults.

In both developed and developing countries, older people are not of great value in the modern society. In other words, people are suffering from depreciation and isolation. This fact reflects some negative stereotypes of older adults among the people of young generation. However, for the last 15-20 years some significant changes have taken place in most developed countries, which have principally influenced the system of social welfare of older adults, state social policy, and changing of the deep-seated attitude to old-agers.

Thus, most of the people of the old age consider education as an opportunity for growth and adaptation in society, communication and social activity. Since older people adaptation is realized harder under present-day conditions of social-economic and technical development, we can consider education as a successful adopting and developing mechanism, which is mutually advantageous and helpful for both the individuals and the society. It helps the old age generation of people to save

themselves from social isolation and turn themselves for socially active and creative members of society.

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