

Educational Gerontology

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Definition

The term “educational gerontology” was first used in a 1970 doctoral program at the University of Michigan to denote those “activities and study that occur at the interface of education and gerontology” (Peterson 1980: 68). It achieved academic prominence some years later with the publication of the first issue of the international journal *Educational Gerontology*, where “educational gerontology” was defined as the:

... study and practice of instructional endeavors for and about aged and aging individuals. It can be viewed as having three distinct, although interrelated, aspects: (1) educational endeavors designed for persons who are middle aged and older; (2) educational endeavors for a general or specific public about aging and older people; and (3) educational preparation of persons who are working or intend to be employed in serving older people in professional or paraprofessional capacities. (Peterson 1976: 62)

Peterson (1978, 1980) elaborated upon his original definition in his essays in *Introduction to Educational Gerontology* and *Educational Gerontology* where he embedded the subfield of educational gerontology in a “3 × 2 matrix” that postulated the major elements and activities of this area of study and practice. While across the top of the matrix, Peterson (1980: 68) situated three instructional audiences – namely, “(1) instruction of older people, (2) instruction of general or specific audiences about aging, and (3) instruction of persons who work with or in behalf of older people,” and on its side he included two categories of functions – namely, “study” which included “research on and teaching about the needs, theory, philosophy, and environment in which older people function and the educational implications of this knowledge” and “practice” which comprised “the design, implementation, administration, and

evaluation of instructional programs for older people.” For Peterson (1980), this matrix led to six key components for the practice of educational gerontology:

Instructional gerontology. Research and theory building activities to clarify the elements involved in instructing older people, directed toward the conceptualization process of the circumstances under which older people can learn most effectively and efficiently.

Senior adult education. It includes the planning and conduct of educational endeavors for older people with the purpose of increasing their knowledge and skills so that they might enjoy life more and become more competent to meet the challenges of contemporary life.

Social gerontology. This includes research and theory building designed to understand the condition of older people and to explore the methods for communicating this information to families of older people, decision makers, or agency personnel who could assist senior citizens.

Advocacy gerontology. The dissemination of what is known about the processes of aging to both the general public and specific elements of that public who are in the unique position to be of assistance to older people through direct service, policy formation, or resource allocation.

Gerontological education. The study of instruction of professionals preparing for employment in the field of aging such as personnel who provide direct services in social service agencies, nursing homes, or recreation centers or who work in community and voluntary agencies.

Professional gerontology. Training of gerontologists is designed to lead to the development of skilled practitioners who can design, implement, and carry out the services needed in educating older people, meeting their social service and health needs, and changing society’s attitudes.

Overview

Although Peterson’s contributions remain influential to academic debates in “educational gerontology,” his operational definition quickly fell out of

favor as researchers held his model as being too ambitious. Indeed, the infrastructure of adult education and gerontology departments in most academic institutions was, and continues to be, too limited to meet all of Peterson's listed competencies (Glendenning 1985). In reaction, Glendenning (1983) drew a distinction between "educational gerontology" as focusing on the processes of older adult education and "gerontological education" as the preparation of students and professionals for a specialized career in aging studies. Moreover, he reserved the area of "public education about aging" to the realm of non-governmental advocacy. On similar lines, Jarvis (1990) contended that Peterson's third element (instruction of professional and paraprofessionals) is actually included within the second (instruction about older people), since the latter refers to "the general dissemination of knowledge about the processes of human aging and the facilitation of empathy towards those who are old" (Peterson 1985: 13). Jarvis (1990: 402) argued that "there are only two major divisions within the body of knowledge. . . educational gerontology and gerontological education." He reasoned that while gerontology is a specialist field of practice and study rather, and a unique combination of knowledge drawn from a variety of disciplines, older adult education is a specialty within education and a subspecialty within the education of adults. Jarvis anticipated correctly that in the future one would expect educational gerontology to separate itself from gerontological education "given the fact that they have profoundly different knowledge bases in the first place" (Jarvis 1990: 408).

At the turn of the 1990s, a consensus was reached in both adult education and gerontological academia that Peterson's components of educational gerontology are best broken up into two areas: educational gerontology (older adult learning) and gerontological education (teaching gerontology). Since then, while researchers seeking to progress our knowledge of the optimal way to prepare students to work in aging settings grouped their work under the term of "gerontological education," others strictly focusing on some aspect of learning in the later years confined the term "educational gerontology" to refer to the teaching and

learning of older adults (Findsen and Formosa 2011). Accordingly, for the past three decades, the boundaries of educational gerontology were taken to stretch around the following four areas of interest:

Instructional gerontology: How older people function; environmental context; educational motivation; early school leavers 40–50 years ago and the learning situation; the psychology of learning; memory and intelligence; learning aptitude; program models; teaching method; good practice, theory, and research.

Senior adult education: Enabling older adults to extend their range of knowledge and skills; assessment of student needs; training of tutors; curriculum development; marketing and delivery; evaluation.

Self-help instructional gerontology: Learning and helping others to learn; how to teach and how to learn in a self-help mode; establishing a curriculum; quality control; establishing standards; access to educational institutions; encountering distrust of formalism; need for independence; consumer sensitivity; developmental potential; relationship of teacher and taught; good practice, theory, and research.

Self-help senior adult education: Learning groups; coping skills. . . helping the homebound, the institutionalized, the frail elderly; reminiscence; administration; assistance; problem of travel.

(Glendenning 1989: 125 – italics in original)

The subsequent parts of this entry focus on the key theoretical underpinnings, research findings, and innovative learning practices that permeate the field of educational gerontology.

Theoretical Underpinnings

Early rationales advocating an improved educational provision for older persons were located within the functionalist paradigm, as researchers highlighted how late-life education can enable persons to later life. In a seminal article, Groombridge (1982) outlined five reasons why education is beneficial to an aging population: to

promote self-reliance and independence, to enable older people to cope more effectively, to boost their contribution to society, to encourage older persons to impart their experiences to each other and to other generations, and to enhance self-actualization. A theoretical rupture occurred during the late 1980s as critical educational gerontologists – while not disputing the possibility that older adult education may offset a range of benefits for participants – decried that such a standpoint harbored a degree of “instrumental rationality” and, as a result, is too preoccupied with means rather than ends (Allman 1984). The first wave of critical educational gerontology was grounded upon four principles:

- (i) a focus on the linkage between the relationship of capitalism and ageing on one hand, and education in later life on the other, (ii) challenging that education for older people is a neutral enterprise, (iii) a sensitivity towards concepts such as empowerment, transformation, and consciousness-raising, and (iv), a praxeological approach based on dialogue between tutors and learners. (Glendenning and Battersby 1990: *passim*)

In retrospect, critical educational gerontology was a welcome counterpoint to conventional philosophies of late-life education whose *raison d'être* had always been closely utilitarian, rather than normative, in character (Formosa 2011). While Cusack (1999) advanced a community program of research and teaching that enables older learners to become aware of stereotypical assumptions about what it means to be old, Formosa (2000, 2005, 2007) conducted fieldwork at the University of the Third Age in Malta and highlighted how it is possible for older adult educational practice to arise as yet another euphemism for glorified and oppressive practice on class, gender, and ethnic grounds. Yet, critical educational gerontology was not immune to criticism, as educationists championing a humanist paradigm in educational gerontology perceived its principles as too “dubious,” “comprehensive,” and “wide-ranging” (Percy 1990) and pushed forward for yet another theoretical break in educational gerontology. Learning in later life, for educational gerontologists backing a humanist paradigm, constituted:

...a matter of personal quest. Learners begin from where they are; they follow the thrust of their own curiosities in order to make what is around them more meaningful; ideally they should be free of external constraints so that they can learn until they are satisfied, until they have achieved the potential that is within them. (Percy 1990: 23)

To this effect, Withnall's (2006: 30) empirical study on the experiences of older adult learners concluded that “the drive towards emancipation and empowerment implicit within [critical educational gerontology] is inappropriate in that it assumed an unjustifiable homogeneity among older people and appears to be imposing a new kind of ideological constraint.” Indeed, educators such as Nye (1998) provided strong documentation highlighting the difficulties in enabling older learners to reach satisfactory levels of emancipation. Taking stock of this critical-humanist debate is not straightforward as both sides possess valid arguments in favor of their standpoint. While persons may be inherently “good,” they are ultimately situated in a “turbo-capitalist” social reality characterized by an irreversible destruction of nature and cultures, so that everyday experiences may be anything but “humanizable.” As such, the search for an alternative formulation that conceptualizes educational gerontology in terms of a really continuous “lifelong” learning that would straddle economic, democratic, personal, and other concerns across the life course in an inclusive way is currently still elusive.

Key Research Findings

Despite the burgeoning number of research articles in the field of educational gerontology, research on the participation rates of older persons in learning activities remains sparse, as studies tend to be based on relatively small samples gathered in particular geographical areas. In the United States, the 2005 National Household Education survey found that 23% of adults aged between 65-plus participated in a nonaccredited learning activity organized by community or business institutions in the previous year (O'Donnell 2006). Recent data from Eurostat reported that in

2017, across the EU-28 Member States, 4.9% of the population aged 55–74 participated in formal and nonformal educational activities, although this figure reaches 5.8% if one takes in consideration only the EU-15 Member States (Eurostat 2018). However, if one researches the participation of older adults in solely nonformal learning activities, one elicits higher results as in the case of the survey conducted by the Spanish National Institute of Statistics which found that 22.8% of the sample aged 55–74 participated in a learning activity in the previous 12 months (Villar and Celdrán 2013). Research found that contrary to stereotypical notions on third age learning, older adults do not only want to learn about a large range of topics resembling academic disciplines but also want to learn practical life and vocational skills (Boulton-Lewis 2010). As Talmage et al. (2015) pointed out, many learners want to learn about art and learn through artistic experiences such as drawing, painting, theatre, and music but also life skills regarding their changing bodies and lifestyles as they age, as well as computer skills and subjects in the natural and physical sciences such as biology, marine habitats, geology, and astronomy.

Initial research suggested that older adults are motivated to learn so as to meet five types of needs – namely, coping, expression, contribution, influence, and transcendence (McClusky 1974). It is noteworthy that while the first four types may be found in adult education studies, the need for transcendence is unique for older learners in that contemplative needs or needs for life review are unique to older adults. Another influential direction in the study of motivations for engagement in late-life learning was O'Connor's (1987) distinction between expressive needs (personal development and social relations) and instrumental needs (work, career, and skills requirements). Some motivations, however, defy a simply expressive-instrumental dichotomy as many older adults were also found to engage in learning pursuits to expand their social support networks following divorce, widowhood, and “empty nest” transitions. Hodkinson et al.' (2008) notion of “acquisition versus becoming” – namely, acquiring

knowledge and skills and undergoing a process of personal reconstruction, respectively – is yet another useful typology when deciphering the motivations underlying older adult learning. Although one finds some evidence in favor of instrumental motivations for learning in later life – to sustain employment or gaining job-specific skills or qualifications (Phillipson and Ogg 2010) – research revealed a major shift in favor of expressive motivations. While Tam (2016) found that “learning is the broadening of my horizons” and that “learning allows me to continue employment or to rejoin the workforce after retirement” were the two statements most and least strongly agreed among survey respondents, Kim and Kim (2015) reported that self-actualization (sense of enjoyment, satisfaction, and achievement) was found to be the most influential motive among older adults learning English as a foreign language. Such a line of research has been, however, criticized for adhering to the “misery perspective,” which leads to a research direction focused on age-related problems such as diseases and overall health decline (Talmage et al. 2015). As a result, researchers like Boulton-Lewis (2010) and Villar and Celdrán (2013) have begun to focus on third agers' potential for new knowledge acquisition and fulfilment of learning needs, rather than focusing solely on how learning can meet physiological, psychological, and social needs.

Innovative Learning Practices

Older adult learning holds a rich tradition in the United States (Findsen and Formosa 2011). There is now a general consensus that the inaugural lifelong learning institute targeting older persons was the Institute for Retired Professionals, which was established in 1962, by “a group of 152 retired New York City schoolteachers. . . in Greenwich village,” and later renamed as “Institutes for Learning in Retirement” (Manheimer et al. 1995). Such institutes have operated uninterrupted for the past half-century, and although there is no single model of operation, they all share a similar feature in that they are hosted by a college or

university with a similar culture and sense of mission. Throughout the 1970s and 1980s, other organizations replicated or adapted the Institute for Retired Professionals model. While 1972 witnessed the launch of a lifelong learning program for older persons in the faith-based, volunteer-run, Shepherds Centers, in 1976, the Fromm Institute for Lifelong Learning was established to provide retirees with daytime, noncredit, college-level courses in a variety of academic subjects (Manheimer et al. 1995). Elderhostel (Road Scholar since 2011) was founded in 1975 to organize weeklong courses of instruction and discussion in colleges and universities, and by 2006, it was successfully organizing some 8,000 programs throughout the world to about 160,000 members (Jarvis 2012). Another key player in delivering learning programs for older persons, the Bernard Osher Foundation, was founded in 1977. Its mission remains to enhance the quality of life in later life through a lifelong learning network under the aegis of the Osher Lifelong Learning Institutes, a consortium of some 130 institutes who, despite their different modes of organization, provide noncredit educational programs to adults aged 50 years or older (Shinagel 2012). Harvard University also recognized the lifelong learning movement and in 1977 founded the Harvard Institute for Learning in Retirement, whose size – since the early 2010s – was maintained at a steady annual number of 500 to 550 members (Manheimer et al. 1995).

In Europe, the practice of educational gerontology is centered around the Universities of the Third Age (U3As) and University Programs for Older People (UPOPs). The U3A, which was founded in 1973, can be defined as sociocultural centers where older persons acquire new knowledge of significant issues or validate the knowledge which they already possess, in an agreeable milieu and in accordance with easy and acceptable methods (Formosa 2014). UPOPs refer to the tendency of European universities, but mostly in Spain and Germany, to open their degree programs to older persons (Fernández-Ballesteros et al. 2013). A similar movement to the UPOPs is found in Japan, and in 1993, China began establishing Universities for Seniors in line with

the government's 7-year development plan which decrees that all universities should open their doors to older persons (Jarvis 2012). Another popular learning movement targets older men (Formosa et al. 2014) and chiefly typified by the Men's Sheds organization which originated in Australia and defined as:

...any community-based, non-profit, non-commercial organisation that is accessible to all men, and whose primary activity is the provision of a safe and friendly environment where men are able to work on projects at their own pace in their own time in the company of other men. (Australian Men's Sheds Association, as cited in Golding 2015: 10)

Another innovative organization is the Elder Academy, founded in Hong Kong in 2007, whereby local schools and welfare organizations team up to run "elder academies" in which older persons have the opportunity to interact and work with younger learners, thus promoting intergenerational learning (Tam 2016). Objectives include "to maintain healthy physical and mental well-being, to realize the objective of fostering a sense of worthiness between the elders and the young, to optimize existing resources, to promote harmony between the elders and the young, [and] to strengthen civic education" (Chui 2012: 152).

Future Directions of Research

Much water has passed under the bridge since Peterson's definition of educational gerontology saw the light of the day. Educational gerontology has passed from being an emergent field of study to a recognized domain in both adult education and gerontology faculties, distinguished by a thriving sum of publications that expound its theoretical, empirical, and policy boundaries. A running theme is that educational gerontology is "empowering and transformational by meeting the diverse and sometimes different personal, social and well-being needs of older adults" (Findsen et al. 2017: 509). However, this is not the same as saying that the field does not include research lacunae and new directions in future research are especially warranted. First,

educational gerontology requires more attention to participation studies that, rather than simply uncovering the characteristics and motivations of distinctive learners, also understand the causes as why working class older adults, older men, older persons living in rural communities, and ethnic minorities are reluctant to participate in older adult learning. Second, more research is required on the valuing and recognition of late-life learning that takes place outside formal and nonformal contexts and on how older adults engage in self-directed learning, sometimes in isolation, and at other times with family members and friends, through various institutions that range from religious centers to libraries to the social media. Third, the educational system that spends some 18 years, and substantial financial capital, to prepare citizens for adulthood is clearly ageist. Research is required on pre-retirement learning models that would include subjects as diverse as the formalities surrounding pensions, the drawing of wills, and strategies active and successful aging. Fourth, the challenges that older persons face in their attempt to enroll in formal learning have been largely overlooked, and thus far, older learners remain largely outside higher education. Research is required to identify how higher education may enable older adults to play a leading role in creating a new type of aging for the twenty-first century (built around extended economic, family, and citizenship roles), unlocking mental capital and promoting well-being in later life, and supporting a range of professional and voluntary groups working on behalf of older people. Finally, the field of older adult learning tends to be hijacked by the “successful aging” paradigm, thus rendering the presence of physical and cognitive frailty as a *persona non grata*. This is unjustifiable since many older people experience mobility and cognitive challenges to the extent of becoming housebound or having to take up residence in care homes. Thus, there warrants a strong research drive as how older adult learning, both in theory and practice, can bridge third and fourth age avenues so that older persons with physical disabilities and dementia have an equal opportunity for inclusion in late-life learning.

Summary

In the 1970s, educational gerontology referred to all those activities and study that occur at the interface of education and gerontology. Yet, such an operational definition was found to be overly ambitious by gerontologists and educationists alike, and in the 1980s, a distinction was made between “educational gerontology” as focusing on the processes of older adult education and “gerontological education” as the preparation of students and professionals for a specialized career in aging studies. Rationales in favor of educational gerontology were in consensus on the beneficial impacts of older adult learning, although a rift emerged between conservatives and radicals who stressed adjustment and empowerment, respectively. The 1970s were an extremely fertile ground for the establishment of institutions providing nonformal learning opportunities to older adults – most notably, Institutes for Learning in Retirement, Elderhostel, and Universities of the Third Age. Future research directions should focus on that interface between educational gerontology on one hand and participation studies, informal learning, pre-retirement learning, higher education, and fourth age learning.

Cross-References

- ▶ [European Civil Society Platform on Lifelong Learning](#)
- ▶ [Senior learning](#)

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EEG

► [Electrophysiology](#)

Effectiveness of Care

► [Quality of Care](#)

Effectiveness of Respite Care for Caregivers of Older Adults

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Synonyms

[Adult day care](#); [Short breaks](#); [Social support](#)

Definition

Respite care is an umbrella term for a range of services provided intermittently in the home, community, or institution to provide temporary relief to the principal informal caregiver. Services include sitting services, day care, host family care, and overnight care. Some services also provide activities or interventions for the care recipient and/or the caregiver.

Overview

The overarching aim of respite care is to promote the well-being of the caregiver by providing substitution for the normal caring duties of the unpaid caregiver (Shaw et al. 2009). Studies of respite care are enormously heterogeneous (Mason et al. 2007a; Shaw et al. 2009; Thomas et al. 2017). They vary in terms of their study design, the intervention investigated (setting, staffing, duration, access costs, flexibility), the type of caregiver and type of care recipient who participate, the benefits, costs and harms measured, and whether or not effects on care recipients are assessed. As there is unlikely to be a “one-size-fits-all” model for respite care, its effectiveness will necessarily be context-specific (Thomas et al. 2017).

The evidence base is disappointingly weak. Empirical studies are generally small, of low methodological quality, and with short-term follow-up. There remains a dearth of evidence on the economics of respite care (Knapp et al. 2013).

Qualitative studies have documented the barriers to uptake of respite care, including caregiver attitudes, awareness of services and their perceived quality, acceptability, and flexibility. This evidence is useful for informing intervention design and policy decisions.

Key Research Findings

For all types of respite, the effects upon caregivers are small or not statistically significant. Higher quality studies identify modest benefits only for certain subgroups (Mason et al. 2007b).

There is no reliable evidence that respite care delays entry to long-term residential care, and some evidence that the likelihood of institutionalization is higher in respite users (Shaw et al. 2009). For care recipients with dementia, there is no evidence that respite affects the risk of institutionalization one way or the other (Maayan et al. 2014).

Many studies report high levels of satisfaction with respite care by caregivers, although satisfaction appears to be lower if care recipients have challenging behaviors or if the quality of respite