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Lifelong Learning in Later Life: The Universities of the Third Age

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Abstract

The University of the Third Age (UTA) has developed into a global success story. Whether holding a “top-down” administrative arrangement or embodying a culture of self-help, there can be no doubt as to the triumph of UTAs in meeting the educational, social, and psychological needs of older persons. However, a cautionary note is warranted since UTAs may at times function as yet another example of glorified occupational therapy that is both conservative and oppressive. Moreover, UTAs seem to be running the risk of becoming obsolete as societies embark on a “late-modern” model of the life course. This article calls for the UTA movement to go through a cultural revolution to remain relevant to current ageing lifestyles. Five key directions are forwarded: embracing a transformational rationale, making more use of e-Learning strategies, extending UTA activities to frail and physically dependent older people, organising activities that promote intergenerational learning, and ensuring that access overcomes class, gender, and ethnic biases.

One of the most successful providers of older adult learning is the University of the Third Age (UTA). UTAs can be loosely defined as socio-cultural 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. Since its inception in the early 1970s the UTA movement has developed into a global success story, spreading to all continents, and amounting to several thousand units with varying structures and programmes. UTAs are nowadays linked through an International Association which has succeeded in gaining accreditation to the United Nations. Despite the pervasiveness of the UTA movement, analytical writings on such a phe-

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nomenon are hard to come by in North American literature. This article attempts to meet a lacuna by presenting a critical exposition of the UTA movement, tracing its origins and developments, as well as its current arrangement and future aspirations. With thousands of centers and millions of members dispersed on five continents, it is a journey worth taking.

Initial Developments

The first University of the Third Age arose from the French 1968 Law on the Direction of Higher Education, which gave universities the obligation to provide for the organization of lifelong education. At that time, France did not have anything corresponding to the British “night school” tradition, but the *Université de Troisième Age* was to alter such a situation radically. The UTA phenomenon was born from the ideas of Pierre Vellas (1997) who recognised the combined vitality and longevity of older persons. Vellas held that the goal of the UTA was to investigate—without any preconceived notions—how higher education could improve the quality of life of retirees who, as demographic statistics at that time suggested, were becoming increasingly numerous and whose socio-economic conditions were often in a deplorable condition. In 1972, Vellas proposed the idea of the UTA to the Administrative Council of the Teaching and Research Unit in Toulouse, which included representatives of the professors, students, administrative personnel, as well as the World Health Organisation, International Labour Organisation, and of course, the United Nations Educational, Scientific, and Cultural Organisation. The UTA proposal was unanimously adopted and without any specific budgetary means. Following much preparatory work, four major objectives were formulated for this new educational enterprise: (1) raise the level of physical, mental, social health, and the quality of life of older people, (2) realize a permanent educational programme for older people in close relation with other age groups, (3) co-ordinate gerontological research programmes, and (4) bring to fruition initial and permanent education programmes in gerontology.

The UTA in Toulouse eventually opened to anyone over retirement age who was willing to fill in a simple enrollment form and pay a nominal fee (Philibert, 1984). The learning activities were scheduled for daylight hours, five days a week, for some eight or nine months of the year. After the programme was marketed on a limited basis, 100 older persons attended the opening session in the summer of 1973. Teachers were highly enthusiastic about the motivation and sheer human warmth displayed by older students, and marveled at the way they learned with new techniques such as the available audio-visual language laboratories. One must underline that initially there was nothing exceptional about this programme, apart from the fact that a section of a large provincial university had taken an interest in ageing, and decided to enlist the resources of the university in pro-

grammes for senior citizens which would, at the same time, provide some returns in pursuing research in order to define the needs of older persons. However, successes were so swift that other third-age universities were created very quickly in other continental European countries such as Belgium and Switzerland. The Toulouse UTA model was eventually adopted by over a 100 campuses and by 1979 there were more than 2,000 enrolled students. Although there were some variations, almost all UTAs developed in the early and late seventies had university affiliation, relied on using university facilities, including the services of faculty members, and generally offered programmes of study tailored toward older persons, such as the medical and social problems of ageing. Moreover lectures were combined with debates, field trips, and recreational and physical opportunities.

In 1979, French and British adult educators interested in the potential of education in later life met at Keele University (UK). They produced an educational manifesto which was to be the heart of the British UTA movement, and stated that the concept of older persons as both teachers and learners needs to replace the image of elders as being necessarily dependent or burdensome (Midwinter, 2004). The first UTA in England was established in Cambridge and launched in July 1981. In contrast to the French experience, the Cambridge UTA rejected the idea of pre-packaged courses for more or less passive digestion, and demanded a kind of intellectual democracy in which there would be no distinction between the teachers and taught. British UTA coordinators appealed that all members would be expected to participate, and those who were reluctant to teach would contribute in some other way such as administration or counseling. Hence, UTAs in Britain did not develop into campus-based organisations but were more akin to Illich's (1973) visions in *Deschooling Society*. They sought a kind of intellectual democracy in which there would be no distinction between the teachers and those being taught, and consequently, a self-help rather than a government-supported model was adopted. Self-help groups are voluntary, small group structures for mutual aid and the accomplishment for a specific purpose. They were formed by peers who have come together for mutual assistance in satisfying a common need, and bringing about desired social and/or personal change. Indeed, the British UTA experience proved to be one of the most successful exercises in social cooperation, radical adult education, and older age citizenship since World War II.

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International Expansion

The UTA movement has gone a long way since its inception in the early 1970s and is currently present on five continents. It is surely not the scope of this article to present an international perspective of the UTA phenomenon. It suffices to state that at the turn of the millennium China alone included some 19,300 centers with about 1.81 million members (Thomp-

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son, 2002). In the year 2009 Australian and New Zealand UTAs included 211 (64,535 members) and 60 (10,154 members) centers, respectively (U3A Online, 2009). The United Kingdom listed as many as 731 UTAs with a total of 228,873 members in the same period (The Third Age Trust, 2009). The United States represents one of the few countries where UTAs were and have not yet been established. One key reason is that in the 1960s America began its own version of older adult learner programmes with what at the time were called Institutes for Learning in Retirement (and are now referred to as Lifelong Learning Institutes). These institutes were and continue to be almost exclusively based in colleges and universities.

There is no one model of running a UTA. Financial matters, for instance, are highly varied. In the Czech Republic the Ministry of Education provides half a million euros for UTAs. Other UTAs are associated with “official” universities and simply benefit from the use of premises. In Switzerland, on the other hand, everything is in the hands of volunteers, with activities funded by members’ subscriptions and extra payments. Since the late 1990s, a number of educational institutions began to investigate the suitability of cyberspace for older adult education. UTAs were not an exception, and much excellent work has been conducted in Australia under the auspices of U3A Online (U3A is the acronym for Universities of the Third Age based on the British model). U3A Online provides good quality educational programmes to older Australians who are relatively isolated and devoid of social networking activity, so that an overwhelming number of participants gave the thumbs-up to this distance learning project and even calling for further expansion (Swindell, 2002).

An international survey carried out by the International Association of Universities of the Third Age (AIUTA, 2006) found that almost half the members are in the 60-69 age cohort (40 percent), followed by peers in the 70-79 age cohort (23 percent), and with half the members being either married or having significant partners (49 percent). A large segment of members joined the UTAs to learn new knowledge (41 percent), although the furthering of social contacts (38 percent) proves to be yet another significant motivation. On joining UTAs, members reported increasing friendships (15 percent), personal satisfaction (9 percent), self-awareness (4 percent), social involvement (5 percent), and success in learning new knowledge (17 percent). Reasons for not renewing one’s membership in the UTAs included cost (10 percent), health (24 percent), transport issues (13 percent), family care (19 percent), and lack of interest (14 percent). Members also called for more courses in information and computer technology, astronomy, languages, memory work and natural sciences, as well as more intercultural and intergenerational activities which, unfortunately, most UTAs still lack despite the current international emphasis on intergenerational solidarity. Such data reflects past surveys (Swindell, 1990a, 1990b) as well as more recent assessments. For instance, Yenerall (2003) found that

the average age of Finnish members is 68, as much as 85 percent are female, and that the majority were married (52 percent) and had completed secondary education (70 percent). Similarly, reasons for joining the UTA consisted “to learn more and gain a general education,” “take or complete practical courses,” and “better understand problems faced.”

The UTA experience is surely more than an educational one. When members are asked what they gain from involvement in UTA activities, the first thing that comes to mind is not usually related to learning but to the associated social outcomes, such as making new friends who share their interests and finding a support group which helps them through difficult periods in their personal life (Formosa, 2009). Indeed, UTAs are typified by a sense of vitality and dynamism that go beyond what is usually the case in a normal adult education center (Huang, 2006). They fulfill various positive social and individual functions such as aiding lonely older persons to re-socialize themselves by enabling them to form new groups and increase their interests. They also provide opportunities, stimulation, patterns, and content for the use and structure of the older persons' free time which would otherwise be characterised by inactivity. UTAs also develop in members a lofty and progressive delight of life, increase the social integration and harmony of older persons in society, inject a sense of creativity in older persons, and make older persons more visible in society. They improve members' abilities of understanding the objective world by aiding them to grasp better world development and social progress, and help them to ameliorate their abilities of self-health by enabling them to master medical care knowledge and prevention of disease. UTAs also address various intellectual, emotional, physical, leisure, and spiritual needs of older persons, as well as provide older persons with the opportunity to organise and coordinate social/cultural activities and thus make their lives more fruitful and energetic.

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Current Issues and Concerns

Despite the various successes of the UTA movement, a cautionary note must be warranted since the organization also faces a number of challenges. One key area of concern relates to the movement's rationale which is influenced by the theories of role change and activity theory (Formosa, 2007). Education is perceived as a means of helping older persons remain active and contributing to society, disseminating needed life skills information that ranges from consumer to health-related information. UTA providers believe that education adjusts older persons to decreasing physical strength and health, the retirement transition and reduced income, death of spouse, and changing social and civic obligations. UTAs are also advocated for their health and psychological benefits on the premise that learning experiences keep brains active so that learners are able to improve, or at least maintain,

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their physical and cognitive health status. Although such rationales present various valid arguments they remain incomplete on their own. They operate within the “individual pathology” model which sees older persons as deficient following their loss of work and status, and too limited to capture the complexity of older people’s engagement in pastimes and their participation in education, because their orientations and relationships to their activities are multi-dimensional. Unique backgrounds to later life (such as social class, gender, and ethnicity) have a diverse impact on the expectations, opportunities, and abilities, and thus, on educational motivation and aptitude. Moreover, ethical difficulties abound because it is not straightforward as to who should decide what constitutes older adults’ needs so that it remains imperative to differentiate between “needs” and “wants.”

A second issue concerns the movement’s middle-class values and aspirations. As early as 1979, it was declared that the movement “pandered to the cultural pretensions of an aged *bourgeoisie* who had already learned to play the system” (Morris, 1984, p. 136). More recently, it was underlined that there continues to be a compounding class divide affecting chances to return to learn: “Older people who have experienced post-school education and training, and those who already have advanced qualifications and skills are already convinced of the joy of learning and return for more” (Carlton and Soulsby, 1999, p. 72). On the other hand, working-class older people often feel alienated by their previous experience of the educational system, and to be least confident about their ability or opportunity to return to learning. In sum, as far as class politics are concerned, field research found that UTAs serve as a reproductive and domesticating educational agent since they do not elaborate on all the various forms of learning but only on those that go hand-in-hand with a functional-liberal paradigm (Formosa, 2000). In doing so, they function as organizations which celebrate middle-classness at the expense of other class cultures on an inconspicuous public. Moreover, it was also noted that UTAs have not escaped the “pervasiveness of schooling,” as they tend to operate through a top-down model of instruction which cultivates respect for authority, experts, and universal knowledge. Rather than taking the form of a corporation of persons devoted to a particular activity, as the medieval interpretation of the term ‘university’ presupposes, UTAs incorporate traits highly similar to those found in traditional education.

Gender biases occupy another lacuna as UTAs tend to be organised by women but planned in “masculine” ways (Formosa, 2005). Whilst the unique learning patterns of older women are overlooked, it is also worrying that the learning interests of men are generally neglected. UTAs fail to consider the existing experiences of the participants, and evaluate them in gender-specific ways so that the learning experience is fair to both genders. Indeed, older women learners differ from older men as they are more self-directed and appear to have greater life satisfaction, are more likely to study

personal or self-fulfillment type topics, and prefer learning activities that are expressive rather than instrumental in nature. Moreover, older women are more likely to experience situational barriers (arising from one's situation in life such as care-giving responsibilities) and dispositional barriers (self-perceptions such as believing the idiom, "an old dog cannot learn new tricks") to learning. Subject areas that are primarily of interest to men, such as vocational skills and sport issues, are rarely found in the course curriculum. Indeed, to my knowledge, a literature search of past and contemporary work in educational gerontology finds no entries dealing with the interests, learning preferences, and perceptions of older men. While some research papers and policy positions do focus on gender, such work focuses on women rather than gender differences as such, although Williamson's (2000) critical analysis of Sydney's UTA is a notable exception.

UTAs can also be indicted for celebrating a phase of life at the expense of more older and frail peers, namely those in the fourth age of the life course. Although the term "fourth-age" is a social construction, it refers to a phase that usually precedes death during which individuals are frail and physically and socially dependent. Late-life learning, as professed by UTAs, overlooks peers who are housebound due to physical disabilities and with residents of residential/nursing homes. UTAs seem to assume that only mobile and healthy elders are interested in educational classes. Indeed, programmes neglect how education opportunities can serve towards the personal development of frail and dependent older people since learning reduces dependency and the concomitant costs of health care. Whereas funding is the most commonly quoted barrier to making for the inclusion of frail older students, *The Fourth Age Learning Report* (Soulsby, 2000) argues that the need for attitudinal change is more pressing. In fact, where activities are beginning to happen it is often because there is a dawning realisation that such engagement reduces dependency and its related concomitant costs, rather than the realisation of an equal right to learning opportunities irrespective of physical frailty. Moreover, there is a lack of common understanding among UTA planners of the terms used to describe older people in care settings and of the nature of fourth-age learning. This confusion over terms actually prevents and delays the development of collaborative learning programmes with frail, housebound, and dependent older persons. Undoubtedly, further study is required into the impact of older adult learning on health and the wider social and community involvement of UTAs in fourth-age learning.

Finally, the UTA movement is characterized by a tendency for its structure of roles and norms to change more slowly than contemporary social change. UTAs flourished in a time when older people were mainly poor and with similar outlooks. Now, post-work identities experience various deliberations, arising through increasing material consumption, and a wary position in relation to providing for "old age." On the premise that

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late-life learning must run in parallel to the biographical experiences of learners, research uncovers four problems (Formosa, 2009). First, UTAs portray older adults as a homogeneous group when cohorts of older persons are so diverse. Indeed, no effort is made to address the diversity of the ageing population, such as on the basis of gender, health status, ethnic background, sexuality, educational skills, and social class. Second, UTAs provide an age-segregated form of learning. Although third-age segregated learning provides a greater degree of commonality, this choice makes UTA programmes lack the potential towards greater generational tolerance and dissolving of age-related stereotypes. Third, UTAs generally refrain from engaging in e-Learning strategies. The increasing rates of computer literacy and the Web 2.0 revolution provide us with an opportunity that can, very cheaply, increase the range of educational opportunities through a stimulating level of interactivity. Finally, UTA courses are too heavily based on the liberal arts, when nowadays retirees are embracing the philosophies of active and productive ageing by engaging in consumer lifestyles, and some, even seeking to re-enter the labour market. Hence, UTAs must expand its learning focus to include consumer education, financial literacy, and skill-development training.

Future Visions

It is against such research outcomes that I have constructed five praxeological codes for the UTA movement and older adult learning in general. The objective is to focus on “what could or ought to be” rather than “what is.” The guidelines have the potential to improve both the quality and participation rates of late-life learning so that the UTA movement becomes more an actual example of transformative education rather than yet another euphemism for glorified occupation therapy.

A transformational rationale. The provision of older adult education, even within the UTA movement, should bridge a functionalist rationale with a transformational project, where learning initiatives are directed to aid older persons gain power over their lives. This is necessary because education or learning must not be viewed as simply a commodity which, via the medium of a lecture, anybody may acquire. Rather, both education and learning are to be viewed as a vehicle for retraining or adjusting to technological change, relating to self-fulfillment and the reinforcement of a sense of purpose, and above all, a catalyst for individual and social empowerment. UTAs must provide opportunities for older adults to become conscious of the cultural dimension of messages about aging, to assess their validity on the basis of individual experience and broader research, and to develop their own individual and social perspectives. Rather than simply offering high-brow learning, UTAs must offer the process of engaging older adults in dialogue to enable them to discover their own meaning, identity, and purpose

in the face of cultural messages about ageing. Moreover, emphasis must be put on the contemporary threats of elder abuse, age discrimination, as well as the dark side of excessive consumerism. In sum, UTAs must embrace a rationale for a transformative approach to education against the backdrop of an analysis of the current political scenario marked by neo-liberalism and the effect of this ideology on educational policy and practice.

Social inclusion. UTAs must dismantle those barriers which exclude older persons other than from privileged backgrounds from seeking membership and participating in its educational and learning activities. UTAs must work to counter psychosocial barriers such as the stereotypical and ageist belief in the adage, “I am too old to learn,” and situational barriers such as disability which may prevent people’s adequate mobility or the need to use public transport may limit access. As regards institutional barriers, UTA centers must not contain difficult enrollment procedures (such as high fees, inappropriate venues, or unexciting methods of teaching and learning), and communication hurdles such as brochures printed in too small type and cramped formatting or a failure to display brochures in places that older adults frequent. Moreover, UTAs must work hard and offer alternative learning to attract older men who currently show little interest for pursuing mental activity during their retirement years. Of course, the larger, more intractable issues that form the real barriers include educational and class status, and lack of power, which require more radical solutions. In the UTAs’ effort to attract working-class men, more visibility is warranted to the fact that the term “university” is actually used in the medieval sense of the term ‘*universitas*’ that is, referring to a corporation of persons devoted to a particular activity, and does not refer to awarding of degrees, diplomas, or any other kind of certification. It is important that UTAs rally against a passive stance that waits for older persons to knock on their door and engage in serious outreach that seeks to include subgroups which generally do not feel inclined to engage in learning activities.

e-Learning. UTAs must put more effort to embed their learning strategies in the Web 2.0 revolution which now provides extremely user-friendly applications. Contrary to its predecessor, Web 2.0 uses interactive tools—ranging from blogs, wikis, podcasts, online journals, to virtual picture databases—which offer limitless possibilities for interactive, empowering, and participatory forms of older adult learning. Engaging the strategies of Information and Communication Technology (ICT) is advantageous both for the learners as well as the institutions. Through the utilization of ICT strategies, UTAs have the potential to reach new learners interested in lifelong learning who may not be able to be physically present in the classroom at a specific date, and hence, who otherwise might not have been able to participate in educational programmes. On the other hand, seniors benefit by discovering new and further fields of education, widening their information sources, taking part in communication with other people with

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common and specific interests, and being able to participate in learning activities even when they are suffering temporary or permanent ill health. Such implications are imperative in contemporary societies, considering that an increasing number of persons are turning to self-directed learning in their post-work years. Self-directed learning can be described as intentional and self-planned learning, where the individual is responsible for and in control of the learning. This learning manifests itself in a variety of ways or projects, ranging from formal, informal, to non-formal, but one can safely assert that it occurs most often at informal levels, and in recent years, through online strategies.

Fourth-age learning. The educational and learning needs of frail older people, especially the physically dependent and those living in residential and nursing homes, must be made central to the UTA movement. UTAs must recognize that different modes of mental activity should be recognized among the older cohorts. These may range from passive to the creative since older people have varying control over the learning activities in which they participate. Older people, irrespective of their cognitive abilities, should be fully involved in the maintenance of their past skills and interests, and in developing new ones of their choice. UTAs must therefore work hand-in-hand with residential units, care homes, and sheltered schemes, and encourage older people to maintain contact with the local community by facilitating residents to attend outside learning activities and inviting outsiders to participate in residential home activities. Lifelong learning should really be lifelong, so that policies even cater for those others suffering from Alzheimer's, confusion, and/or dementia. Although such individuals find it difficult to communicate they have not lost this skill, and carers and tutors need to learn how to receive their communication. The UTA movement would do well to take a leaf out of established fourth-age learning programmes and conduct learning initiatives with fourth-agers through reminiscence. Reminiscence learning processes focus on the personal way one experiences and remembers events, and hence, reliving the experiences that are personal in a way that is vivid and engaging. Of course, fourth-age learning must not be conducted haphazardly, and managers and care staff should be adequately trained in the field of older adult learning.

Intergenerational learning. UTAs must be restructured to be able to cater to learners from the whole of the life course, organizing educational activities that link third agers with children, teenagers, adults, and even older peers. For instance, relationships between grandparents and grandchildren are extremely constructive and gratifying for both sides. While the majority of grandchildren have a satisfactory relationship with their own grandparents, they also show a desire for increased contact with grandparents in terms of frequency and intensity that is especially constructed around an educational experience. Research also supports the traditional view that grandparents provide grandchildren with an educational input that is dif-

ferent to that which the parents can provide. This is because apart from being a source of unconditional love and a place where grandchildren can find refuge when seeking consolation, grandparents are crucial providers of knowledge and values. Indeed, the benefits of intergenerational education are well-known. While elders can mentor individuals from the younger generation, they can also learn much from the younger generation. Intergenerational contact creates an opportunity for reciprocal learning, as well as improving the everyday memory function of well older learners. Moreover, such interaction assists in dispelling stereotypes that each generation may hold about each other, whilst also encouraging respect for differences. UTAs must therefore think outside the box to develop intergenerational programmes along a civic dimension which, rather than providing simply sentimental and utilitarian standpoints, deal with the future of urban environment, racial and ethnic conflicts, and positive minority role models.

Conclusion

This article provides a critical exposition of the UTA movement that includes a focus on both current issues and possible directions. The future is bright for the UTA movement, especially now that more regions and countries are experiencing the third-age phenomenon, and that each incoming older cohort is more educated and open to engaging in empowering activities than preceding ones. The UTA represents an extremely commendable effort to enhance the quality of older persons' lives by dealing with the increasing longevity, and contesting the erroneous suppositions that associate ageing with predestined physical and mental decline. One hopes that the movement continues to reflect on its best and deficient practices, as well as brings up its current practices to date with ongoing socio-economic transformations so that UTAs continue to excel in the field of older adult learning.

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