

Research Report on

**Overseas Experience in Providing
Continuing Education for Older Persons**
海外國家為長者提供持續教育的經驗

研究報告

Submitted to
Health and Welfare Bureau
Government of the Hong Kong Special Administrative Region

呈交

香港特別行政區政府
衛生福利局

Y.H. Lui, A. Leung, O.J. Jegede
呂汝漢、梁綺雯、謝家棟

August 2002

二零零二年八月

The authors wish to thank Ms. Elaine Kwok and Ms. Mandy Yu for data collection and compilation and Dr. Bob Butcher and Dr. Joe Ching for comment.

Correspondence should be addressed to Prof. Y.H. Lui, Li Ka Shing Institute of Professional and Continuing Education, Open University of Hong Kong, 4/F, Shun Tak Centre, 168 Connaught Road Central, Hong Kong. (Tel: 3120-9888; Fax: 2246-8635; Email: yhlui@ouhk.edu.hk)

Contents

| | |
|--------------------------------------------------------------|-----------|
| 1. Introduction | 3 |
| 2. Trend of an Ageing Population | 5 |
| 3. Methodology and Sample | 10 |
| 4. Continuing Education for Older Persons in the U.K. | 11 |
| 5. Continuing Education for Older Persons in the U.S. | 20 |
| 6. Continuing Education for Older Persons in Finland | 29 |
| 7. Continuing Education for Older Persons in China | 36 |
| 8. Questionnaire Survey | 41 |
| 9. Summary and Conclusions | 49 |
| References | 56 |

Appendix I: Questionnaire for Older Learners

Appendix II: Questionnaire for Heads/Administrators of Elderly
Education Providers

1. Introduction

Objectives

1.1 The **Li Ka Shing Institute of Professional and Continuing Education (LiPACE)** of the Open University of Hong Kong was commissioned in March 2001 by the **Health and Welfare Bureau**, the H.K.S.A.R. Government to conduct research on overseas experience in providing continuing education for older persons. Specifically, the research project has two major objectives:

- a. *To study the general international trend and current development in the area of continuing education for older persons* (defined as those aged 60 or above)¹ and in particular the experience of some selected countries with considerable experience in this respect; and
- b. *To identify useful and relevant features which Hong Kong may learn from the above studies in formulating appropriate measures to promote lifelong learning opportunities for older persons.*

1.2 The research project is basically *a literature search, supplemented with a questionnaire survey*. The project commenced in April 2001 and was completed in December 2001. This final report aims to provide the findings of how **4 selected countries (the United Kingdom “U.K.”, the United States “U.S.”, Finland and China)** that have considerable experience in providing continuing education for older people are operating in this area, and to identify useful and relevant features from which Hong Kong may learn in formulating appropriate measures to promote lifelong learning opportunities for older persons.

Structure

1.3 The report is structured into 9 chapters. Chapter 2 highlights the trend of an ageing population around the world, the implications that an ageing population will have in a community and the benefits of continuing education for older persons. Chapter 3 explains the methodology and sample used for analysis. Chapters 4 to 7 examine the development and operation of continuing education for older persons in the four selected countries. Chapter 8 reports the results of the

¹ Unless specified otherwise, this definition of older persons (or elderly people) is used throughout the report.

questionnaire survey. Finally, Chapter 9 summarizes and identifies useful features in respect of public policy, training curricula, teachers, etc. for Hong Kong reference.

2. Trend of an Ageing Population

2.1 Everyone will be old sooner or later. With improvements in living conditions, hygiene, medical science, and health and social care, people can expect to live longer than ever. Longevity is no longer a rare event in both developed and developing countries. With a considerable increase in the number of older persons and a significant drop in birth rates, the issue of an ageing population is becoming a matter of concern both globally and locally.

Global Trend of an Ageing Population

2.2 The **World Health Organization** (W.H.O.) pointed out in its Fact Sheet 1998 that the world population is “*ageing*”. In 1998, there were approximately 580 million older persons in the world. ***By 2020, the number of older persons worldwide will rise beyond 1 billion.*** The W.H.O. highlights the following regions or countries which are projected to have a more severe ageing population:

- a. Europe, which is currently the region with the highest proportion of elderly in the population, will continue to be the “oldest” region in the world. In 1998, its elderly people represented around 20% of the total population and this percentage will increase to 25% by 2020.
- b. Japan is projected to be the “oldest” country with 31% of its total population being elderly by 2020.
- c. China will continue to be the country with the largest number of older persons. Its elderly population is projected to be 230 million by 2020.

2.3 **Table 1** shows similar evidence of an increase in the ageing population provided by the **U.S. Bureau of the Census** (2001). In 2000 there were 605 million older persons (9.95% of the world’s total population of 6.08 billion) and by 2025 the number of older persons will reach 1.19 billion (15.13% of the total population of 7.84 billion). Both the increases in percentage and number are alarming.

Table 1: Trend of the Elderly Population

| Countries | Year | Elderly Population (in million) | | | | | | Total Population |
|-----------|------|---------------------------------|-------------------|-------------------|-------------------|-------------------|----------------------|------------------|
| | | 60-64 | 65-69 | 70-74 | 75-79 | 80+ | Total | |
| World | 2000 | 185.11 (3.04%) | 150.93 (2.48%) | 118.86 (1.96%) | 79.60 (1.31%) | 70.69 (1.16%) | 605.19 (9.95%) | 6,079.73 |
| | 2025 | 356.16 (4.54%) | 286.86 (3.66%) | 228.31 (2.91%) | 151.98 (1.94%) | 162.58 (2.07%) | 1,185.90 (15.13%) | 7,840.09 |
| China | 2000 | 40.92 (3.24%) | 34.93 (2.77%) | 25.43 (2.02%) | 15.91 (1.26%) | 11.51 (0.91%) | 128.69 (10.20%) | 1,261.83 |
| | 2025 | 91.21 (6.23%) | 67.24 (4.59%) | 60.78 (4.15%) | 35.49 (2.42%) | 33.59 (2.29%) | 288.32 (19.69%) | 1,464.03 |
| Finland | 2000 | 0.26 (4.98%) | 0.23 (4.37%) | 0.21 (4.04%) | 0.16 (3.11%) | 0.17 (3.37%) | 1.03 (19.87%) | 5.17 |
| | 2025 | 0.35 (6.67%) | 0.33 (6.39%) | 0.32 (6.13%) | 0.29 (5.63%) | 0.32 (6.20%) | 1.62 (31.02%) | 5.21 |
| Hong Kong | 2000 | 0.26 (3.64%) | 0.25 (3.49%) | 0.20 (2.87%) | 0.14 (1.99%) | 0.16 (2.24%) | 1.01 (14.23%) | 7.12 |
| | 2025 | 0.75 (8.56%) | 0.65 (7.41%) | 0.47 (5.32%) | 0.31 (3.53%) | 0.36 (4.13%) | 2.53 (28.95%) | 8.75 |
| India | 2000 | 24.15 (2.38%) | 18.48 (1.82%) | 13.78 (1.36%) | 8.63 (0.85%) | 6.17 (0.61%) | 71.21 (7.02%) | 1,014.00 |
| | 2025 | 54.51 (3.96%) | 42.19 (3.06%) | 30.19 (2.19%) | 19.19 (1.39%) | 15.96 (1.16%) | 162.03 (11.76%) | 1,377.26 |
| Italy | 2000 | 3.41 (5.91%) | 3.09 (5.37%) | 2.77 (4.80%) | 2.25 (3.91%) | 2.31 (4.01%) | 13.83 (24.00%) | 57.63 |
| | 2025 | 4.32 (7.96%) | 3.59 (6.61%) | 3.07 (5.65%) | 2.76 (5.08%) | 4.35 (8.02%) | 18.08 (33.32%) | 54.27 |
| Japan | 2000 | 7.63 (6.03%) | 7.03 (5.56%) | 5.81 (4.59%) | 4.01 (3.17%) | 4.67 (3.69%) | 29.16 (23.04%) | 126.55 |
| | 2025 | 7.43 (6.18%) | 6.89 (5.73%) | 7.44 (6.19%) | 7.59 (6.32%) | 11.22 (9.33%) | 40.58 (33.75%) | 120.24 |
| UK | 2000 | 2.88 (4.85%) | 2.59 (4.34%) | 2.35 (3.94%) | 2.02 (3.39%) | 2.37 (3.99%) | 12.20 (20.52%) | 59.51 |
| | 2025 | 4.45 (7.22%) | 3.65 (5.92%) | 3.01 (4.88%) | 2.78 (4.52%) | 3.60 (5.85%) | 17.49 (28.39%) | 61.61 |
| USA | 2000 | 10.68 (3.87%) | 9.44 (3.42%) | 8.75 (3.18%) | 7.42 (2.69%) | 9.22 (3.35%) | 45.51 (16.52%) | 275.56 |
| | 2025 | 20.76 (6.14%) | 19.72 (5.83%) | 15.89 (4.70%) | 12.16 (3.60%) | 14.88 (4.40%) | 83.40 (24.67%) | 338.07 |

Source: U.S. Bureau of the Census, International Data Base, 2000

Notes: 1. Elderly population is defined as those people aged 60 or above.

2. The figures in parentheses are percentages of elderly population in total population.

2.4 The U.S. Bureau of the Census also provides projections for some other countries. As indicated in Table 1, Japan, Italy and Finland will have the most serious increase in ageing population as the elderly population is estimated to rise beyond 30% of their total population in 2025. In terms of the number of older people, China, India and the U.S. are the three largest countries and their elderly population will be 288 million, 162 million and 83 million respectively in 2025. These three countries together will account for about 45% of the world's total elderly population, up from 41% in 2000.

Local Trend of Ageing Population

2.5 Similar to the rest of the world, Hong Kong is also ageing rapidly. A survey recently conducted by the H.K.S.A.R. Government shows that the number of older persons in Hong Kong will *increase from 965,000 (about 14 % of the population) in 1999 to 1.6 million (19%) by 2016*. According to the projection of the U.S. Bureau of the Census (see *Table 1*), older persons in Hong Kong will also *increase from 1 million (14% of the total population) in 2000 to 2.5 million in 2025 (about 29% of the population)*.

2.6 These projections indicate that the elderly population will substantially increase (at an annual compound rate of more than 3%) in the coming years and both the percentage and number of older persons will be more than double in the next 25 years. The ageing speed of the population is more serious than in the other developed countries (e.g. U.K., U.S.) or even China.

Problems of an Ageing Population

2.7 There is much research evidence that an ageing population may result in a number of socio-economic problems, such as:

- a. While older persons continue to be economically active, a majority of them are *financially dependent*.
- b. Older persons are net *claimers of government welfare benefits*.
- c. Older persons are often associated with deteriorating/poor health which will *add pressure to the Government's health budget*.

2.8 Obviously, if a population is ageing and the older persons become inactive and dependent, this will put an increased burden on a society's pensions, welfare, health and long term care costs. Not all the costs can be expressed in monetary terms and not all costs will be borne immediately. In many cases (e.g. health costs), the impact will not emerge for several decades.

2.9 To tackle the growing burden of an ageing population, several measures have been implemented/considered around the world. In many countries, there is a *movement to create a society where pensions, health and welfare funding are identified as the main responsibilities of an individual – not of the government – with a minimal “safety net” for the poor*. For instance, in Hong Kong the Government introduced the *Mandatory Provident Funds Scheme* in December 2000, obliging the working population to save up some money for their retirement future. In addition, the Government is also reviewing the funding arrangement of the health care system to see if the concepts of “*cost recovery*” and “*users to pay*” can be implemented.

2.10 Regardless of who bears the financial burden, it ultimately falls upon the society as a whole. Therefore, the measures mentioned above may be rather passive and reactive solutions to the problems associated with an ageing population. Recently a more proactive method has been to reduce or to slow down the inactivity and health dependency of older persons through the promotion of “*successful ageing*”.

2.11 Killoran et al. (1997) provides the distinction between successful ageing and normal ageing. “*Where normal ageing is characterized by increasing ill health and functional loss, successful ageing is characterized by the preservation of functional ability... Successful ageing is the avoidance of functional loss, and the maintenance of activity makes an important contribution to this end. This perhaps is most apparent with physical activities and functions, though recent years have also seen considerable research interest in the parallel link between continuing mental activity and the prevention of cognitive or intellectual decline.*”

2.12 Dooghe (1992) suggests ways of preserving functional ability. He reports that “*general satisfaction with life is correlated with social participation, socio economic conditions and the level of health*” and opines that “*education especially during the leisure years enhances mental and physical well-being*”.

Benefits of Learning for Older Persons

2.13 The concept that education protects cognitive functions is well supported in the literature. Several studies document that learning may provide older persons with the following benefits:

- a. To lead to a more meaningful use of time and sense of purpose and accomplishment (Harris & Cole, 1980);

- b. To have the opportunity to learn new things, acquire new skills, and continue to grow and develop (Selehon, Cox & Rathee, 1983);
- c. To reduce the negative impacts of undesirable changes by helping older persons to develop coping strategies and by providing the individual with a variety of new interests or social contacts (Brocket, 1985);
- d. To improve their self-efficacy so that they are able to communicate with other persons (Hurlbut, 1988);
- e. To keep themselves mentally active, to study subjects of interest, to continue personal development, and to make up for opportunities missed when they were young (Kelly, 1989);
- f. To get an outlet for expressive and creative needs (Hiemstra, 1994);
- g. To enrich their own lives, enhance their own health and well-being, and give back to their communities (Lamdin & Fugate, 1997).

2.14 Perhaps the best cases for learning in later life are some older persons' own vivid testimonies in the U.K. [extracted from Carlton and Soulsby (1999, p. 6)]:

- a. *“The benefits of learning have been to feel really alive mentally and physically, through exerting the self-discipline to fulfil the course requirements, to get up and go, to read, to write, to question with increasing awareness. It takes the mundanity out of the essential alcohol of which I'm not keen and more enduring than sex!”*
- b. *“It has given me an interest in life, and a distraction from severe health problems and constant pain. It has also given me a great sense of achievement which has increased self-esteem. For much of my life I have believed myself to be no use at anything, especially after I lost my sight.”*
- c. *“Academic courses have broadened my mind, leisure courses extend my interests, and physical courses have helped me keep as fit as possible.”*

2.15 It is evident that learning may help older persons enhance their adaptability and appreciation of life, thus reducing their dependence on family and government support. As learning is beneficial to the older persons themselves as well as society, satisfying their learning needs has become a policy objective in many countries in recent years. For instance, the *Education and Research Development Plan for 1999 to 2004* published by the Ministry of Education in Finland sets out that ***learning is an important means of maintaining older persons' mental agility, which consequently improves the quality of life and reduces the need for social help***. In Hong Kong, the Government also stated in 1997 that “Care for Elders” would be one of its major policy initiatives.

3. Methodology and Sample

3.1 In this project, overseas experience in providing continuing learning for older persons is mainly studied by *literature review*, supplemented with a *questionnaire survey* conducted among elderly learners and administrators of elderly education providers in the four selected countries.

Criteria of Countries Selection for Study

3.2 To understand the general international trends and current developments in the area of continuing education for older persons, overseas countries with considerable relevant experience were selected for in-depth analysis. Due to resource and time constraints, the countries selected are limited to four and the selection is based on the following considerations:

- a. The countries have *a record of proven success* in providing continuing education for older persons.
- b. The countries have *different models* of elderly education or University for the Third Age (U3A) identified for comparison and reference.
- c. The countries represent the situations of *both developed and developing countries in different geographical regions*.
- d. *Relevant information* about continuing education for older persons in these countries has to be available in English or Chinese.

3.3 The criteria resulted in the selection of the **United States (U.S.), the United Kingdom (U.K.), Finland and China** for analysis in the project. These countries' experience in continuing education for older persons is studied by examination of relevant documents and information in the literature.

Questionnaire Survey

3.4 In addition to the literature search, a questionnaire survey was also conducted among older learners and administrators of elderly education providers in August – November 2001 for two reasons:

- a. To supplement the inadequate information in the literature search.
- b. To obtain direct responses from stakeholders, which may help better understand the effectiveness of these systems.

The results of the survey will be reported in Chapter 8.

4. Continuing Education for Older Persons in the U.K.

4.1 Among the developed countries, the U.K. was perhaps the earliest one to recognize the educational implications of demographic and economic change. In 1960, the **National Institute of Adult Continuing Education (NIACE)**² published a paper “*Education and Retirement*” which aroused the public’s attention to the issue of continuing learning for older persons. Since then, NIACE has been promoting the need for better attention to older persons’ learning needs. In line with the evident trend of an ageing population in the U.K., there has been great attention and support to the development of continuing education for older persons throughout the country.

General and Specific Education for Older Persons

4.2 The U.K.’s system of continuing education for older persons is very comprehensive and consists of both *general adult education* and *specific older persons’ education*. General adult education relates to the provision of education to adults of all ages in which older persons can participate just like other adults. Specific older persons’ education is age-related and, as the name suggests, is specifically designed for older persons.

4.3 Regardless of whether it is general or specific, continuing education for older persons in the U.K. is provided by 4 sectors:

- a. The ***Higher Education (H.E.)*** sector
- b. The ***Further Education (F.E.)*** sector
- c. Local authorities
- d. The voluntary sector

Provision by the Higher Education Sector

4.4 Like other countries, H.E. in the U.K. is still considered as a form of tertiary education for young school leavers continuing with their initial education rather

² The National Institute of Adult Continuing Education (N.I.A.C.E.) is a national voluntary organization aiming to promote continuing education for adults in the U.K. Its members consist of adult education providers, users and policy makers. It works in all fields of education and training, including further education, higher education, employment-led learning etc. and elderly education is one of its specialist areas.

than a system which meets the needs of the whole population. The provision of H.E. is mainly done through full-time taught programmes by conventional universities which are funded by the **Higher Education Funding Council (H.E.F.C.)**. The programmes and related student support are basically geared to younger people rather than the specific social and learning needs of older learners. As a result, the participation of older learners in HE is low. Statistics from the **Higher Education Statistics Agency** show that students over 50 made up only 4.55% of students in higher education (0.5% of all full-time students and 12.6% part-time) and 0.28% of their population age group in July 1996.

4.5 Generally the approaches taken by conventional universities to support older persons' learning include:

- a. Provide "extra-mural" adult education which older students happen to access.
- b. Allow older learners to attend classes and public lecture series as non-registered students.
- c. Develop "non-award bearing continuing education" targeting older learners with the funding of the H.E.F.C.
- d. Provide support (e.g. tutor input, space) to a local *University of the Third Age (U3A)* as their community services.

4.6 Notably, although the participation of older learners in H.E. is low, the **Open University of the United Kingdom (O.U.U.K.)** may be an exceptional case. At the O.U.U.K., about 1 in 5 students is aged 50 and over. The high proportion of older students may be attributed to the O.U.U.K.'s flexibility in offering learning opportunities for adults:

- a. Unlike conventional universities, O.U.U.K. adopts a *system of open education*. There is no admission or prerequisite requirement before commencement of studies, nor a time limit for completion of a programme. Students can take whatever course(s) and whenever they like.
- b. Courses are *part-time courses delivered in distance mode* with optional counseling and tutorial support. Learning by distance reduces the older learners' problem of traveling for classes.
- c. Course *fees are cheaper* due to the cost effectiveness of the distance mode.

Provision by Further Education

4.7 The F.E. sector in the U.K. is large and complex. It consists of about 450 F.E. colleges which attract mature learners. Some colleges are maintained by local

authorities to deliver adult education while some are contracted by local authorities to do so. Following the enactment of the **Further and Higher Education Act 1992** which restricts the funding of the **Further Education Funding Council (F.E.F.C.)** to Schedule 2 programmes³, accredited courses and basic skills, the substantial growth of the F.E. sector has mainly concentrated on F.E.F.C.-funded programmes. These programmes are more vocationally oriented and appealing to adult learners of working age rather than older learners.

4.8 As the F.E.F.C.'s funding mechanism provides no particular incentive to colleges for the provision of non-vocational adult education, the availability of this part (particularly to older learners) has been shrinking and more expensive fees are being charged to participants. In addition, F.E.F.C.-funded courses do not offer remission of fees to older learners (though there are automatic concessions for those on means-tested benefits). Therefore, the F.E. programmes have not been attractive to older persons and their participation remains low. In 1996/7, only 3% of all F.E.F.C.-funded students were over the age of 60 (Carlton & Soulsby, 1999).

Provision by Local Authorities

4.9 In the U.K., local authorities play multiple roles in relation to the creation and maintenance of quality of life for older persons. Besides social services, housing and transport etc., education is also an essential aspect of supporting older persons in their communities. The Further and Higher Education Act 1992 sets out that **Local Education Authorities (L.E.A.s)** have a key role as providers of Non-Schedule 2 adult education⁴ and have a statutory duty to secure adequate further education opportunities for those members of the population who do not want to attend an accredited course or who are not following a vocational aim.

4.10 To discharge their duties, L.E.A.s generally provide adult education services in the following ways:

- a. directly on their own
- b. through a contractual arrangement with further education colleges and/or community schools
- c. a mixture of the above.

³ Schedule 2 programmes refer to those programmes in the Schedule 2 of the Further and Higher Education Act 1992. These programmes are generally related to vocational training and qualifications.

⁴ Non-Schedule 2 adult education refers to the range of informal adult education not necessarily leading to a vocational qualification and not specified under the Further and Higher Education Act 1992 as Schedule 2. Unlike Schedule 2 courses, Non-Schedule 2 education is not funded by the national Further Education Funding Council (F.E.F.C.).

4.11 *Funding for the L.E.A.-provided adult education comes from national government.* The funding is just a general education budget which is not earmarked specifically for adult learning. Besides the provision of Non-Schedule 2 education, L.E.A.s may also offer accredited programmes funded by the F.E.F.C., as well as other programmes to meet particular targets from outside funding sources. These accredited programmes lead to the progression routes into the main educational framework in further education and higher education.

4.12 L.E.A.-provided adult education is accessible to older learners in several ways:

- a. Course provision is usually made in community-based settings, or one-off locations within the community (e.g. libraries, church halls).
- b. Courses are generally open to older persons.
- c. Education comprises a range of non-accredited activities which include arts and crafts, languages, business administration, information technology, personal development, and sports and fitness activities etc.
- d. Most authorities offer concessionary fees to older persons. In some cases older learners are given total fee remission.

4.13 There are a substantial number of older persons participating in the L.E.A.-provided programmes. The U.K.'s Department of Education and Employment discloses that in 1997/1998, the total enrollment was 1.06 million, of which more than two-thirds was for Non-Schedule 2 study and the remaining one-third for Schedule 2 provision.

Provision by the Voluntary Sector

4.14 "Voluntary sector" is a broad term which covers a diverse range of activities and organizations, both formal and informal. Some of these are national and large in scale while some are small and local in their focus. Some may be run by full-time staff and some entirely by unpaid volunteers. The common bond of the sector is an ethical concern about public life, and the value of voluntary work to society.

4.15 Voluntary organizations provide learning opportunities in the following ways:

- a. Enable volunteers to learn by experience and enhance their value through organizing specific activities
- b. Provide training for volunteers, committee members and staff about how to lead and run a voluntary organization
- c. Offer formal or informal structured education and training programmes to members.

4.16 There are many different voluntary organizations involved in providing education and training, some of which have the provision set as their prime aim while some use it to support other social objectives. As far as education for older persons is concerned, the most representative voluntary organizations are the *Universities of the Third Age (U3As)* which are committed specifically to older learners.

U3As

4.17 U3A originated in France. The first French U3A (also the first in the world), **L'Université du Troisième Age** (University of the Third Age in French) was founded by Piere Vellas in Toulouse in 1972 with the aim of improving the quality of life of older persons through education. Generally, the French U3As have the feature of being attached to local universities from which they receive support⁵:

- a. *Conventional universities are the key organizations to support the operation* of the U3A. In addition to the universities' support, local governments also sponsor some French U3As.
- b. *University campuses* are made available for use as the venues.
- c. The U3As' programmes are *mainly taught by university staff*.
- d. The U3A courses are *mostly credit bearing* ones leading to formal awards by the universities, though there are also some tailor-made short courses for the older persons. The *courses are diverse* to meet the needs of various community groups.

4.18 The **French model** has been taken as a model of reference by many countries (e.g. Finland, Belgium, Switzerland, Poland, Italy, and Spain) in continental Europe and also abroad by Quebec in Canada and California in the U.S. (Swindell & Thompson, 1995).

4.19 Referring to the French experience, the U.K. has also developed U3As. Unlike the French model, the U3As in the U.K. are separate from universities (though in many local instances there are still arrangements to borrow space, and sometimes specialist tutors, and to collaborate in projects) and are *voluntary autonomous organizations* in their own right. In essence, *the U.K.'s U3As are a mechanism promoting and providing self-help learning among older persons*. This mechanism has a federal structure, with substantial autonomy for local U3As and a small national office which plays a supportive and coordination role.

⁵ Due to the lack of sufficient information in English, France is not included in this research.

4.20 The first U3A in the U.K. was initiated by Peter Laslett and Nick Coni in spring 1981 with a steering committee formed to carry out this initiative in the region of Cambridge (Leaf, 1994; Lamdin & Fugate, 1997). In March 1982, the committee organized a one-week demonstration course in which participants with various skills were allowed to organize and teach in their own autonomous learning groups. This arrangement was well accepted by all participants and found to be very successful. The successful experience strengthened the belief of developing the so-called “**Cambridge model**” in which older learners were organized to share their knowledge and teach other older persons.

4.21 To further promote the successful experience and the concept of elderly education, later in 1982, the “**Third Age Trust**” was set up as a registered charity and limited company with the aim of promoting active learning, research and community service among older persons. The Trust offers supporting services to a network of hundreds of affiliated U3As throughout the country, including legal advice, resources center, annual conference, summer schools, subject matter networks and computer training. Its structure and operation can be briefly described as follows:

- a. The funding of the Trust comes from members’ contribution calculated on the basis of the number of students. Each U3A is required to support the Trust by contributing a “*capitation fee*” of £2.00 per student. The Trust *does not receive financial support from the National or Local Government* but it does receive sponsorship (both financial and non-financial) from other sources from time to time.
- b. The Trust’s operations are carried out by a small national office (consisting of full-time Administrator/Company Secretary and a few part-time paid employees) under the control of a **National Executive Committee**.
- c. The National Executive Committee is elected by the members of the U3As at the annual general meeting and takes up a leadership role by assisting the foundation of new U3As, supporting the study events as leaders, speakers and members, and promoting public awareness of U3A activities (The Third Age Trust, 2001).

4.22 At present there are about 450 local U3As throughout the U.K., with a total membership of more than 100,000 men and women. These local U3As have the following features:

- a. They are *autonomous self-help organizations*, whose individual activities

are planned and undertaken according to their members' wishes. Members can decide on the nature of learning activities (e.g. course, field-work, small group visit) and relevant proper arrangements (e.g. themes/topics, tutors and places).

- b. Learning in U3As is taken as informal *self-help learning* and not structured as a progression, with accreditation routes.
- c. Members with expertise, knowledge or know-how in various professions or hobbies are encouraged to share their knowledge with fellow members in study groups or activity groups. Thus, *members within the U3A are both knowledge conveyors and recipients*.
- d. The number and types of *courses* offered in each U3A vary according to the size of the U3A and the enthusiasm of the members.
- e. All administrative and study group *activities* in each local U3A are carried out on a completely *voluntary and unpaid* basis.
- f. Although given the title of "university", *no education qualifications* are required or given.

Controversial Issues

4.23 Although the U.K. has quite a long recognition and a comprehensive system of continuing education for older persons, there have been some controversies about the following issues which are considered as barriers to older persons' participation in learning (Carlton and Soulsby, 1999):

- a. Public *attitudes* about older age are still discriminatory and in many cases (e.g. education, employment) older persons are not treated equitably as compared with the younger generation.
- b. In terms of course content and duration, pace of study, options on accreditation etc., the *curriculum* of most adult education is not relevant to the interests and needs of older learners.
- c. *Learning environment and facilities* are generally not user-friendly to older learners who mostly suffer from the problems of limited mobility, impaired vision or hearing, etc.
- d. *Educational advice and guidance services* are neither sufficient nor accessible enough to older people.
- e. *Funding support* to older learners and/or the provision of continuing education for older persons is little, in particular after the enactment of the Further and Higher Education Act 1992 which restricts the F.E.F.C.'s funding to Schedule 2 programmes, accredited courses and basic skills.
- f. The provision of education for older persons is fragmented. There is a lack

of a large scale *government initiative* to bring together cross-generational, cross-sectoral, cross-departmental and cross-party interests to produce a practical and affordable programme of action for the future of an ageing population and thus a lack of *coherent and coordinated policy* and planning among many diverse organizations involving continuing education for older persons.

Recent Developments

4.24 In response to the above issues, several steps have been taken by the U.K. Government. More prominent examples are the two mechanisms set up in 1998 to develop better planning and coordination of services relating to older persons: the **Inter-Ministerial Group on Ageing** and the **Better Government for Older People Programme (B.G.O.P.)**.

- a. The Inter-Ministerial Group on Ageing is responsible for all aspects of older persons' participation in learning and the coordination of relevant government policy and planning across all government departments.
- b. The B.G.O.P. aims to create the atmosphere of "*learning communities*" in British society and strengthen the collaboration of organizations involving education for older persons. It advocates better and coordinated service provision at both national and local levels, and plans and delivers them through all the relevant agencies in partnership. In 1999, there were 28 pilot projects and 315 partner organizations in the B.G.O.P. All the projects were based on local authority areas and the partner organizations involved were the Technical Education Council, F.E. Colleges, Universities and U3As.

4.25 In addition, it is worth noting that individual government departments have also taken several relevant responsive measures to promote and improve the provision of learning opportunities for older persons, e.g.

- a. In 1995, The **Department of Trade and Industry** launched the EQUAL initiative which is concerned with prolonging active life so that people are able to participate fully in work, learning and leisure activities as long as possible. This programme also covers older persons' participation and social inclusion as full and active citizens, for whom continuing to be able to learn is an integral element.
- b. In 1998 the **Department of Social Security** set up the **Royal Commission for the Long-Term Care of the Elderly** to study and report on best practices and means of funding in Long-Term Care for older persons. Among other things, two best practices of supporting elderly education

followed by many City Councils are to open up sheltered accommodation for holding elderly activities and to include learning activities into older persons' individual care plans.

- c. In 1998, the **Department of the Environment, Transport and the Regions** published a white paper "*Modern Local Government: In Touch with the People*" which encourages a national movement towards coordinated policies through local consultation by local authorities with people. As a result, several City Councils (such as Nottingham and Leeds) organize elderly conferences and forums as a conduit to listen to older persons' needs and to discuss a wide range of issues affecting their quality of life.
- d. In 1999, the **Department of Education and Employment** announced a code of practice for employers with aims to reduce age discrimination in employment in general and to tackle the substantial level of long term unemployment among the over 50s in particular. Furthermore, the Department also extended the cut-off age limit for *student loans for H.E.* from 50 to 54 and introduced the *Individual Learning Accounts*⁶ to encourage adult learning. Both schemes are helpful in reducing older learners' financial burden.
- e. The **Health Education Authority (H.E.A.)** continues to study and identify older persons' health needs, review policy towards a national framework of health care, and provide educational support in specific topics (e.g. accident and injury prevention, exercise and mental health). Its continual efforts resulted in the L.E.A. in Kent developing, in conjunction with several local health clinics, a *pilot project*, in which doctors prescribe adult education as a means of therapy to offset loneliness, isolation and inactivity.

4.26 As can be seen, in the U.K. there is a growing acknowledgement that access to learning is an integral element of social independence, welfare and health care for older persons. Moving in this direction, several national government initiatives towards social inclusion and continuing education for older people have been developed and the coordination of planning and policy among diverse organizations is under improvement.

⁶ Individual learning account is something like the education voucher concept. Anyone who is aged 18 or more is eligible to enjoy government subsidy of up to 150 pounds for taking recognized courses from universities, colleges and learning centres etc. and the learning activities taken are recorded in the individual learning accounts maintained by the government.

5. Continuing Education for Older Persons in the U.S.

Emergence of Continuing Education for Older Persons

5.1 Similar to the U.K., the U.S. also has quite a long history of elderly education. In 1949, a **Committee on Education for Aging** was formed under the Department of Adult Education of the **National Education Association (NEA)**.⁷ In 1951, this Committee became a part of the **Adult Education Association of the U.S.** and published the first book about elderly education, *Education for Later Maturity: A Handbook* in the U.S. Nevertheless, before the early 1960s, education for older persons was taken as a minor part of adult education which suffered from an educational bias towards youth. Only from the early 1960s did the trend to segregate older learners from other adult learners emerge because their integration in ongoing adult education programmes was found undesirable and also because of forecasts of unprecedented demographic shifts in the country (Manheimer, Snodgrass & Moskow-McKenie, 1995).

5.2 In response to the forecasted demographic shifts, in 1961 the U.S. Government organized the **White House Conference on Aging** where some emphases were placed on the needs of older learners. In 1965 the Government enacted the **Older Americans Act**⁸ which authorizes the state agencies on ageing to provide education and training to older adults in the areas of consumer education, continuing education, health education, pre-retirement education, financial planning and other education and training services. In 1976, the **Lifelong Learning Act** was passed by Congress to encourage the broadening of educational activities for older persons. Nevertheless, federal funding in support of these legislations was not available until the 1970s and 1980s. As a result of the

⁷ Founded in 1857, N.E.A. is the largest organization committed to advancing the cause of public education in the U.S. It has a total of 2.5 million members who work at every level of education, from pre-school to tertiary level. N.E.A. arranges activities to promote professional development workshops among educators and fight for more resources for schools and institutes.

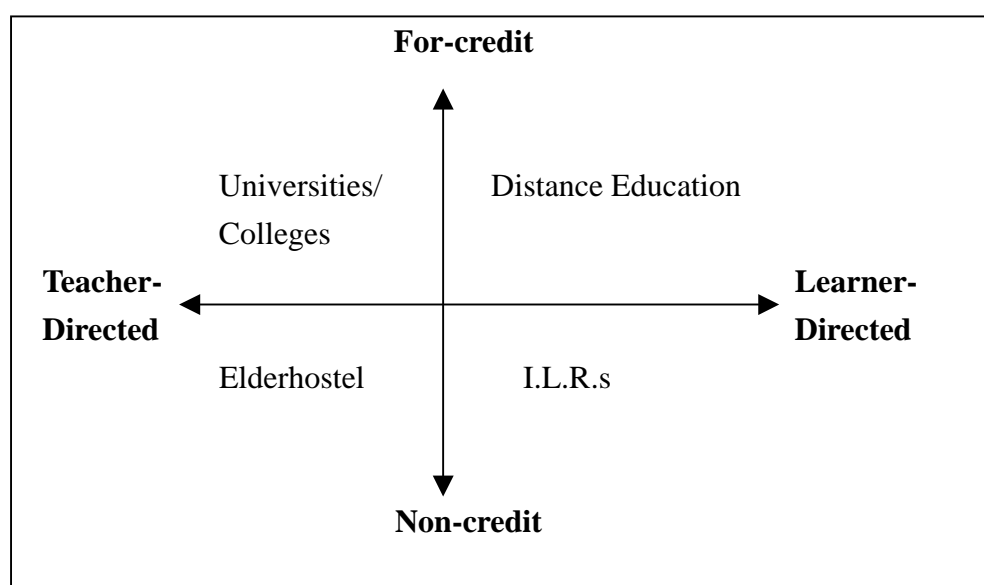
⁸ The Older American Act aims to benefit older persons in areas of income, health, restorative services, housing, retirement, employment, cultural and recreational opportunities, community services and gerontological research. This Act laid the legislation foundation for the establishment of the **Administration on Aging (A.O.A.)** within the Department of Health and Human Services. Under the A.O.A., state and local area agencies on ageing were set up to act as the administrative vehicles for establishing programmes for the elderly. State Agencies on Aging (S.A.A.) will provide funds to Area Agencies on Aging (A.A.A.) which are responsible for identifying and supporting existing services and initiating new programmes for the elderly in respective areas.

funding, various educational projects were launched and these projects have shaped the landscape of learning options open to older learners today (Eisen, 1998).

5.3 Education (formal or informal) for older persons in the U.S. is offered by many types of organizations, such as universities, **Institutes for Learning in Retirement (I.L.R.s**, also named **Learning in Retirement Institutes “L.R.I.s”**), Elderhostel, senior centers, nursing homes and churches etc. Some of these organizations have a clear mission of offering programmes specifically to older learners while some others just provide education for older persons as an add-on outside their mission.

5.4 Eisen (1998) categorizes the education programmes to older persons into four quadrants based on the two dimensions: learning process (“*teacher-directed*” versus “*learner-directed*”) and end award (“*for-credit*” versus “*non-credit*”) (*Figure 1*). Teacher-directed refers to traditional offerings that are planned by expert-educators for groups of learners while learner-directed are peer-based learning activities designed and/or implemented by older learners themselves. As compared with teacher-directed activities, learner-directed learning activities are more individualized and self-paced. For-credit learning consists of educational programmes that are credit bearing and/or lead to formal awards (e.g. degrees and professional qualifications) and non-credit education has nothing to do with credits and awards.

Figure 1: Education Programmes for Older Persons in the U.S.



Source: Eisen (1998)

Teacher-Directed For-Credit Education

5.5 Teacher-directed for-credit education has the feature of *credentialing* for professional or personal reasons. It includes degree programmes and professional designation programmes provided by higher education institutions and accrediting professional bodies. These programmes are generally delivered in a conventional, formal classroom setting, with set meeting times and assignments, to groups of learners of all ages who are interested in earning a credential of some sort.

5.6 Although the programmes are open to all, older persons may not be as enthusiastic as youth and younger adults because their goals, priorities, and schedules are less compatible with traditional college classroom teaching. According to the National Center for Education Statistics (2001), in 1999 only 1.5% of adults aged 65 and above participated in credential programmes⁹ while this age group had a total of 18.7 % taking part in different kinds of learning activities (*Table 2*).

5.7 Higher education institutions (e.g. universities, 4-year colleges and community colleges) are the major providers of the teacher-directed for-credit programmes. These institutions offer programmes either directly or through their **Divisions of Continuing Studies**. The following are some measures taken by individual universities and colleges to support older learners in their credit-bearing programmes:

- a. Offer credit courses specifically designed for older persons.
- b. Provide credit courses at reduced tuition rates or free of charge.
- c. Allow students aged 60 or above to audit credit courses with fees reduced or waived if space is available.
- d. Arrange the teaching of full-term credit courses at off-campus sites.

Learner-Directed For-Credit Education

5.8 In addition to teacher-directed for-credit programmes, higher education institutions also provide learner-directed for-credit education to older persons in the form of *distance education*. Distance education is a self-guided approach to fulfilling the requirements of an accredited degree programme or a professional qualification. While as for-credit education, distance programmes enable learners to earn a credential of some sort, at the same time they offer the learners the freedom of choice and thus the *convenience* in terms of learning timing, pace,

⁹ Credential programmes are formal post secondary programmes leading to a college or university degree, a post secondary vocational or technical diploma, or other education certificates related to qualifications for jobs.

location and independent exploration of the learning materials. These greatly reduce older learners' access issues (such as limited mobility and physical disability) and are more oriented to the individual needs of older learners. As a result, older persons' participation in these programmes is getting more popular.

Table 2: Adult Learning Activities by Age

| Age | 1991 Total | 1995 Total | 1999 Total | Type of adult learning activity ¹ in 1999 | | | | |
|--------------------|---------------|---------------|---------------|------------------------------------------------------|--------------------------------------|--------------------------------------|---------------------------|-----------------------|
| | | | | Basic skills ² | Credential ³ Full-time | Credential ³ Part-time | Work-related ⁴ | Personal ⁵ |
| 18-24 | 69.1 | 68.3 | 69.9 | 8.9 | 35.0 | 13.8 | 16.7 | 22.5 |
| 25-34 | 42.2 | 53.0 | 60.3 | 2.2 | 7.5 | 15.7 | 29.7 | 25.2 |
| 35-44 | 46.6 | 51.0 | 51.7 | 0.9 | 2.2 | 10.6 | 28.7 | 25.1 |
| 45-54 | 33.3 | 47.0 | 49.5 | 0.7 | 1.7 | 7.7 | 27.0 | 24.6 |
| 55-64 | 23.0 | 28.2 | 35.2 | 0.4 | 0.3 | 4.8 | 18.9 | 17.3 |
| 65 and above | 10.5 | 15.2 | 18.7 | 0.3 | 0.3 | 1.2 | 3.4 | 14.5 |

Source: National Centre For Education Statistics, U.S. (2001)

Notes:

1. Percentages may not add up to the totals because individuals may have participated in more than one type of adult learning activity.
2. Basic skills learning refers to courses which aim to improve adults' basic reading, writing, and math skills or prepare for a high school diploma or its equivalent.
3. Credential programmes are formal post secondary programmes leading to a college or university degree, a post secondary vocational or technical diploma, or other education certificates related to qualifications for jobs. The figure includes courses provided by either post-secondary institutions or other types of providers.
4. Work-related courses are courses related to a job or career other than post-secondary credential programmes, for example, courses taken at work or courses for a license for a job.
5. Personal development courses refer to various types of educational activities that have instructors and are not included in other categories. Examples include courses related to health, hobbies or sport lessons, foreign languages, dance or music, etc.

Teacher-Directed Non-Credit Education

5.9 Due to its feature of credentialing, for-credit education is formal and often associated with pressure in assessment. For those older learners who do not want to have pressure in their learning and those who are not interested in obtaining formal awards, teacher-directed non-credit education is more appealing. The

attractions of teacher-directed non-credit programmes are:

- a. In nature, non-credit programmes are always elective and can range from educational to creative and to informational.
- b. Unlike formal credit courses, other activities (e.g. recreation, travel, health promotion) can be added into the learning process according to learners' preference.
- c. Being teacher-directed, the structure of relevant programmes is generally well-organized and the expert-teacher can be taken as a valuable source of knowledge.

With these attractions, teacher-directed non-credit education is widely welcomed by older persons of diverse needs and preferences. At present, it serves the largest number of older learners in the U.S. today. As shown in Table 2, in 1999 there were 14.5% of adults aged 65 and above taking personal development courses.

5.10 Teacher-directed non-credit programmes are provided by several organizations including senior centers, hospitals, Elderhostel, universities and colleges etc. Among these organizations, the most prestigious and also the largest provider is Elderhostel.

Elderhostel

5.11 **Elderhostel** is a non-profit making organization offering learn-and-travel programmes for adults aged 55 and over. As compared with formal, classroom-based continuing education, *Elderhostel programmes are unique in their combination of study, travel, and social interchange with an aim to challenge older adults, to excite them to new experiences and opportunities, and to offer them stimulating intellectual activity.*

5.12 Elderhostel was founded in 1975 by Marty Knowlton (a world traveler and former educator) and David Bianco (a university administrator). Upon return from a 4-year walking tour in Europe, carrying only a backpack of bare essentials and staying in youth hostels, Knowlton was impressed by the youth hostel concept and this inexpensive way of learning. With the belief that American older adults could remain active after retirement by continued opportunities to learn, Knowlton, together with Bianco (the then director of residential life at the University of New Hampshire), came up with the concept of a hostel for elders. After a series of discussions and sharing, they eventually organized the "pioneer" Elderhostel programmes to 220 Elderhostelers at five colleges and universities in New Hampshire in 1975 (Hopp, 1998; Lamdin & Fugate, 1997).

5.13 Due to its unique nature of combining stimulating non-credit classes on a wide variety of subjects with comfortable and inexpensive lodgings, the concept of Elderhostel has gained widespread acceptance quickly. In 1976, there were 21 colleges in 6 states offering 69 Elderhostel programmes to 2,000 enrollees. In 1980, Elderhostel programmes were offered in all 50 U.S. states and in most Canadian provinces and the number of Elderhostelers was over 20,000. In 1981, Elderhostel offered its first *international programmes* in Mexico, Great Britain and Scandinavia. In 1985, the first *intergenerational programme* was offered, pairing grandparents with their grandchildren. In 1988, Elderhostel established the **Elderhostel Institute Network (EIN)**¹⁰ to support the ILR movement¹¹.

5.14 At present, Elderhostel is the world's largest education and travel organization for older persons. Each year it offers over 10,000 programmes in more than 100 countries to about 200,000 Elderhostelers.

Characteristics of Elderhostel Programmes

5.15 The popularity of Elderhostel programmes results from their combination of learning and traveling together as a learning package to older persons. The following are some characteristics of their provision:

- a. Programmes (with accommodation provided) are *offered at various sites* (e.g. college campuses, conference centers, inns or hotels). Participants travel to the site of learning for one- to three-week programmes with groups of 15 to 40 participants.
- b. By policy, all courses provided are *centered around liberal and humane studies*. These include arts; literature; history; social, physical, and biological sciences, nature and the environment; and imaginative combinations of all of the above.
- c. Courses are *accompanied by field trips and extra curricular activities* (e.g. walking tours, bicycle tours, cruises, barge journeys, cultural excursions and home stay etc.) and ample *provision is made for social interaction*.
- d. There is *no assessment* (such as homework, tests or examinations) and thus no grades. Immersion in the subject matter is for the pure joy of learning.

¹⁰ E.I.N. is a voluntary association of independent I.L.R.s, with missions to strengthen and support the effectiveness of their programmes and to spread the I.L.R. concept to new communities.

¹¹ The support of E.I.N. to I.L.R.s is limited to providing information, promoting communications and encouraging the development of new I.L.R.s. E.I.N. does not prescribe fees or approve curricula (these are done by each I.L.R. independently). In addition, all advertising and registration are handled locally by each I.L.R.

- e. Classes are typically *teacher-directed* and instruction is given by college professors or accredited experts.
- f. *Flexibility* is allowed *in class attendance*. Participants are expected to attend all classes, but they are free to be serious or casual students. For some, the travel component and the extracurricular activities may take precedence over the courses.
- g. Some Elderhostel programmes are *international programmes* which provide participants with the opportunity to discover the people and culture, environment and history of the countries visited.
- h. From 1985, Elderhostel also offers *intergenerational programmes*, in which grandparents with their grandchildren are paired in different learning adventures (ranging from simple school- or community-based tutoring arrangements to reciprocal caregiving initiatives, oral history programming, joint choirs and collaborative arts projects etc.) These programmes provide participants with mutual benefits as the elderly can be in regular contact with other generations, while the young cohorts can solve social or civic problems with advice from the elderly (Eisen, 1998).

5.16 As a non-profit-making organization, Elderhostel is *operating on a self-financing basis*. Its revenue mainly comes from programme tuition fees charged to participants. To fulfil its mission of making their programmes accessible to all older adults, Elderhostel sets a reasonably low tuition to enable more older adults to participate. To bridge the gap between tuition revenue and operating expenses, Elderhostel has launched the *Annual Fund* since 1982. The Fund collects contributions, donations and sponsorship in a similar way to a college or university alumni fund raising programme.

5.17 As can be seen, the concept of Elderhostel has been very successful in the U.S. and its pervasiveness in older adult culture is manifest. The appeal of Elderhostel to older persons is well explained by Lamdin & Fugate (1997) as follows:

“Programmes are intellectually challenging without being threatening and hostellers are not burdened with an imposed need to perform. They combine the romance of travel to interesting places with the opportunity to learn and socialize with interesting peers. Elderhostel’s association with colleges and universities give it a certain cachet. Participants are energized by the mental and social stimulation and feel that they have gained something of permanence that will enhance their lives.”

Learner-Directed Non-Credit Education

5.18 Different from teacher-directed education, learner-directed non-credit education is directed either by the learner and his/her peers, or by the learner alone. This ranges from informal individualistic activities (e.g. the internet, hobby clubs, libraries) to formal organized activities provided by voluntary organizations such as the ILRs.

Institutes for Learning in Retirement

5.19 I.L.R.s are *community-based membership organizations of retirement-age individuals* who share a love for learning. Each I.L.R. is a unique organization reflecting the needs and goals of its sponsoring campus and participants from the local community. The following are some common features of I.L.R.s (Lamdin & Fugate, 1997):

- a. I.L.R.s are *self-governing organizations* operating on a membership concept. They have full autonomy in making decisions about their courses, fees and other by-law issues.
- b. I.L.R. *members* tend to be highly educated (with over 50% having graduate or professional degrees) and many of them have teaching experience. They may volunteer to coordinate courses, either in their previous fields of specialty or in some new fields of interest they have pursued in depth. The common bonds are intellectual curiosity and personal interest.
- c. I.L.R.s are generally *sponsored by higher education institutions* for their provision of classroom facilities and some administrative support.
- d. *New I.L.R.s* may originate through action by the sponsoring colleges, universities or other learning institutions, or within a group of elder learners who work together to persuade a college to serve as sponsor.
- e. The *courses* offered by the I.L.R.s are *mostly peer-designed and peer-led*. Older learners design their own college-level curriculum according to their own needs and interests. They can share their opinions, knowledge and expertise with peers. Occasionally university professors are invited to give a lecture or course, or graduate students are invited to deliver talks/seminars about their research projects.
- f. *Courses* cover several *areas* such as arts, humanities, interdisciplinary studies, local history, community and intercultural issues, foreign affairs and current issues. The mix of theories and practice may vary from course to course, and there are often special lecture series, social events, and sponsored expeditions to nearby galleries, museums, historical sites, and

theatrical and musical performances.

- g. There are *no assessment* or grades in the I.L.R. courses.
- h. Unlike traditional adult education programmes, I.L.R.-provided courses are *offered in the daytime* and last for 6-15 weeks.

5.20 The first I.L.R. (known as the **Institute for Retired Professionals “I.R.P.”**) was formed by a group of retired teachers under the sponsorship of the New School for Social Research in New York City in 1962. During the subsequent years, the idea spread primarily by word of mouth. Gradually more I.L.R.s have been developed throughout the country. In 1988, 24 I.L.R.s collaborated with Elderhostel to form the E.I.N. With Elderhostel’s support, the I.L.R.s developed more quickly. Since 1988, there have been more than 200 new I.L.R.s being developed. Today the E.I.N. links more than 220 independent programmes at institutions of higher education across North America. I.L.R. sponsors include Duke University, Harvard University and many other state universities; liberal arts colleges (e.g. College of Notre Dame in Maryland) and community colleges (e.g. Cape Cod Community College in Massachusetts).

6. Continuing Education for Older Persons in

Finland

6.1 In the U.K. and U.S., the formal education system takes more care of the learning needs of youth and only offers general education for older persons as part of adult education. A majority of specific education services for older persons (e.g. U3A, Elderhostel) have been developed outside the education system with little government involvement and support.

Official Role and Involvement

6.2 Compared with these 2 countries, Finland has a relatively formal policy and strong government commitment in elderly education. These can be seen in the following developments (Ministry of Education, Finland, 2001):

- a. Since Finland became independent in 1917, extension of education to all citizens (irrespective of age, domicile, economic situation, sex or mother tongue) and all parts of the country and the continuous efforts to increase the level of education have constituted a policy. Education is considered as a fundamental right of citizens of all ages and the *education policy has long been underpinned by the concept of lifelong learning*.
- b. Since the establishment of the first U3A (referred to as **U.T.A.** in Finland) in the government-funded higher education system in 1985, *all U3As have been financially supported by the Finnish Government*.
- c. In 1989, the Government established the **National Advisory Board** to coordinate and develop the activities of all U3As.
- d. In 1991, the **Ministry of Education**¹² acknowledged the U3A as a special form of open university education with the aim of providing older persons with opportunities for independent studies at the university level without a formal requirement of qualifications.
- e. In the Government's *Education and Research Development Plan for 1999 to 2004*, the Ministry also clearly indicated that learning was an important means of maintaining older persons' mental agility, which consequently improved the quality of life and reduced the need for social help.

¹² The Ministry of Education is the highest education authority responsible for education, science and cultural policies. It promotes education, science, culture, sports and youth work and emphasizes their significance for citizens and society.

6.3 Continuing education for older persons in Finland can be categorized as *general adult education* and *specific elderly education*. General adult education is arranged by universities, polytechnics, public and private vocational institutions, adult education centers, sport and music institutes, and folk high schools etc. while specific elderly education is mainly offered by U3As. In Finland all U3As are formed within universities and thus become part of its education system. A snapshot of the education system is fruitful to understand the continuing education for older persons.

Education System

6.4 The Finnish education system is divided into three levels: *basic education* (Year 1 to Year 9), *post-basic education* (upper secondary schools and vocational education) and *tertiary education* (universities and polytechnics), and it has the following characteristics (Ministry of Education, Finland, 2001):

- a. Basic education is compulsory and the right to free basic education for all residents is guaranteed by statutes.
- b. The law obliges public authorities to secure for everyone an equal opportunity to obtain education other than basic education which accords with their abilities and special needs and to develop themselves without hindrance due to lack of means. In this connection, post-basic education is free of charge and entitles students to the State's financial aid. The education system has also been structured to provide everyone with an opportunity to obtain vocational education or higher education.
- c. All *universities*, though given extensive autonomy, are owned and funded by the State. There are 20 universities in Finland: 10 multidisciplinary universities, 3 universities of technology, 3 schools of economics and business administration, and 4 art academies.
- d. The **Ministry of Education** is the highest educational authority responsible for supervising all publicly funded education, including universities.

Universities

6.5 In addition to degree programmes, universities provide adult education in the following ways:

- a. All universities have *continuing education centers* which are responsible for offering adult education. Each year there are about 134,000 students in continuing education.
- b. Out of the 20 universities, 19 provide **open university education through**

their centers for extension studies, which have some 80,000 students each year.

Open University

6.6 Unlike the O.U.U.K. model, the open university in Finland is realized as *a study system based on cooperation mainly among universities*¹³, rather than as an autonomous university (*Figure 2*). The open university education has the following attributes:

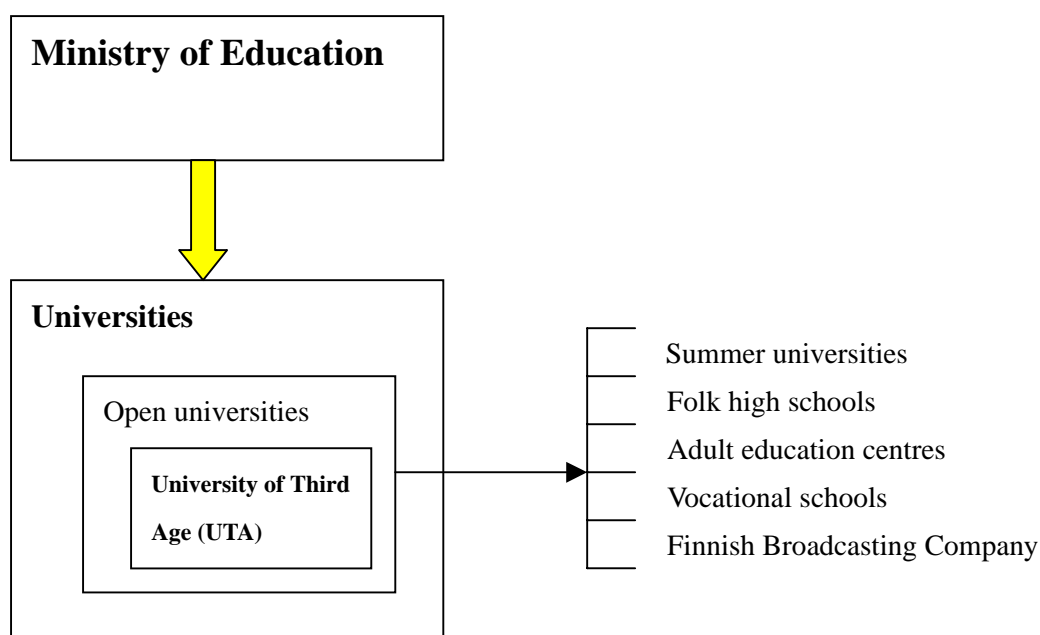
- a. There are no formal educational requirements for *admission*. It is open to all, regardless of age and educational background.
- b. All study is *part-time* and the teaching is arranged in evenings and weekends.
- c. *Courses* are offered in almost all fields but over half are in education, humanities and social sciences.
- d. The open university *teaching* is equivalent to basic university teaching. Each university has its own *curriculum* and requirements for a degree. Although it is not possible to complete a whole degree via open university study, students with an agreed amount of open university study may be admitted to regular programmes in a flexible way and have full recognition of the earlier studies.
- e. Credits are not automatically transferable between universities.
- f. By law open university education is offered at cost prices. *Tuition fees* only cover study administration costs (e.g. information, supervision, study materials and similar items). Fees vary with teaching arrangements, universities and fields of study.
- g. Besides tuition fees, open university activities are mostly *funded* using the allocations made *by the Ministry of Education* to the higher education institutions.

U3As

6.7 In Finland, U3A is *a special form of open university education*. It refers to the *open university teaching geared to senior citizens*. The main objective of U3A is to offer them scientific knowledge and opportunities to independent studies at the university level without formal requirements of qualifications.

¹³ Universities are the main providers of open university education. They organize over 70% of total open university teaching by themselves and co-offer the rest with other organizations such as summer universities, adult education centers, folk high schools and vocational schools.

Figure 2: Education system in Finland



6.8 The first U3A in Finland was founded in 1985 at the University of Jyväskylä. Some months later, another U3A was also established at the University of Helsinki. Afterwards, the U3As subsequently formed were also all connected with universities. In 2001, there were U3As running at 9 universities (out of a total of 20 universities in Finland) and the U3As' activities are coordinated and developed by a national advisory board set up in 1989.

Principles Underlying U3As

6.9 There are 3 major principles underlying the establishment and operation of the Finnish U3As:

- a. ***Right of lifelong learning***: The U3As are taken as an important part to promote lifelong learning and widen the lifelong learning spectrum. With U3As, older persons are able to preserve their right and ability to learn and develop themselves even after their active working life. Studying can promote the older persons' physical, psychological and social well-being in many ways.
- b. ***An integral part of the university***: All U3As are organized as an integral part of the local university via open university education. There are no admission requirements regarding age or education background. The goal of students attending the U3As is to widen their scope of thinking, to develop

their personality and to get tools to comprehend the surrounding world, rather than any qualification awards (e.g. degrees) or professional upgrading.

- c. **Cooperative planning:** To encourage students' personal initiative, programmes and other learning activities are designed jointly by university academic staff and students on the basis of the principle of cooperative planning. The knowledge and skills gathered through one's life can provide different views on the matters planned and studied.

U3A Programmes

6.10 To meet the diverse learning needs of older persons, there is a wide range of programmes offered by U3As. These programmes vary considerably in the context and the way of realization. ***Each U3A can develop activities according to its own needs and preferences and there is no standard model.*** Generally, programmes organized depend largely on the "age" of the university, with older universities having a greater variety than the younger ones.

6.11 U3A programmes usually take several forms of activity aimed at enhancing participants' physical, psychological and social health; promoting their desire to understand the surrounding world; and improving dialogue between generations. These include the following activities:

- a. **Discursive Multidisciplinary Lecture series:** This is the most popular form of U3A study. The scope of the lectures' themes is very wide and a lecture series may be designed around a single theme (e.g. the sea).
- b. **Seminars:** Seminars are small group presentations and discussions covering topics in relation to physical exercise and health, life cycle, human relations, art appreciation, cultural tradition, local history, social studies, women's issues, languages, creative writing and literature, and biography writing etc.
- c. **I.T. courses:** Depending on the level, these courses provide participants with some basic I.T. skills (e.g. how to handle the computer, how to use word processing programs and how to search for information and communicate via the Internet) as well as more advanced skills in photoprocessing, pagemaking and webpublishing. In many cases, students with more advanced skills are welcome to serve as tutors in basic IT classes.
- d. **Excursions and study tours:** These are the tours to local institutions, museums, and exhibition halls and even abroad, arranged to expand students' knowledge acquired at the lectures.
- e. **Research and publishing:** For those older learners who want to pass on their

experience and knowledge to benefit the whole community, they may participate in research seminars to develop scientific thinking, carry out research (particularly third age-related projects) and produce publications.

- f. ***Distance learning in old age homes***: This refers to individual U3As' arrangements of tape-recording some of their lectures, producing relevant study material, and making these available to senior students who have limited mobility. In addition, study groups are also arranged to meet with tutors in old age homes and other institutions to listen to and discuss these taped lectures.

6.12 As a special form of open university education, ***U3As are financed by the State through fund allocated to their universities out of the education budget***. In addition, ***programme tuition fees are also charged to participants at cost***.

6.13 Due to the Government's active promotion of lifelong learning and support of U3As through the university system, the U3A programmes have been very popular in Finland from the very beginning. Each year, there are some 7,000 older persons participating in these programmes. The average age of the participants is 69 years. Their basic education varies from primary level to tertiary and the vocational profile is also very heterogeneous (Third Age Universities in Finland, 2001).

6.14 In short, the Finnish U3As have been developing in accordance with the French model. Government-funded universities play a key role in supporting the operation of U3As.

U3A Visions

6.15 Last but not least, it is worth mentioning that the Finnish U3As have set the following visions for the future:

- a. To develop ***more research*** to further improve education for older persons, in particular to encourage U3A students themselves to develop research, theory and concepts in relation to old age.
- b. To function U3As as a catalyst of ***public discussion about old age***, in view of the fact that the mission of U3As is not only to offer opportunities for study, but also to give a new meaning to old age and to change people's lifestyle and concepts on ageing.
- c. To use U3As as a channel to make ***older persons a valuable resource*** (their experience and knowledge) used more effectively for the society.
- d. To explore the idea of an ***inter-age university*** in which interaction between

university and U3A students is more facilitated.

- e. To develop *distance learning methods and telematics* which could facilitate participation of older persons who live far away from the universities themselves.

7. Continuing Education for Older Persons in China

7.1 In 2000, China had an elderly population of 129 million, i.e. 10.20% of its total population (The U.S. Bureau of the Census, 2001, see Table 1). Although this percentage was low as compared with other developed countries, the elderly population in China is indeed more problematic for the following reasons:

- a. China currently has the largest number of older persons in the world.
- b. The number of older persons will increase rapidly in coming decades. It is projected that the number will reach 288 million in 2025.
- c. The country has a strict policy of birth control in order to control its population growth. With a rapid increase in the numbers of elderly and a drop in the birth rate, the proportion of the population who are elderly will significantly increase from 10.20% in 2000 to 19.69% in 2025. The ageing speed is far higher than other developed countries.¹⁴

7.2 In view of its significant number of older persons and rapidly ageing population, the Chinese Government has long recognized the problems of ageing population and taken measures to deal with these problems.

The Government's Elderly Policy

7.3 China has a long cultural history and a strong sense of filial piety. To some extent, this is reflected in the government policy about older persons. Based on the belief that it is a family's responsibility to take care of the elderly, the Chinese Government sets out in the **Marriage Law 1950** that "*children who have come of age have the duty to support and assist their parents*" (Article 49). In addition to placing a primary responsibility of elderly caring on families, the Government also takes an active attitude towards studying its role and providing support in care provision to older persons (Tracy, 1991).

7.4 In 1982, the **China National Committee on Ageing Problems** (中國老齡問題全國委員會), later renamed as the **China National Working Commission on Ageing** (中國全國老齡工作委員會), was established with the primary responsibility of evaluating ageing policies and liaising with related government and non-government departments for the implementation of elderly services

¹⁴ Taking France as an example, it took more than a century for the proportion of elderly population to increase from 7% in 1865 to 17% in 1980.

within the country. The Committee spawns numerous branch committees at various levels (such as city-level Committee, district-level Committee and street-level Committee). These local-level committees, which are under both the local governments and the National Committee, supervise the development and implementation of elderly services, including elderly education at regional and city levels (Lai, Tse & Tang, 1995).

7.5 To further protect older persons' rights in China, in 1997 the Government enacted **the Regulations for Protecting Rights of the Elderly in People's Republic of China** (中華人民共和國老年人權益保障法；簡稱<老年法>) which covers a wide range of protection (Tso, 2001):

- a. *Older persons have the right to receive continuing education* (Article 31);
第 31 條規定：老年人有繼續受教育的權利
- b. *Older persons' strength and expertise should be developed* (Article 40);
第 40 條規定：...發揮老年人的專長和作用
- c. *According to the societal needs and possibility, older persons should be encouraged to perform activities within their capacity and willingness* (Article 41).
第 41 條規定：根據社會需要和可能，鼓勵老年人在自願和量力的情況下，參與社會活動

The legislation shows that the Government recognizes continuing education for older persons as part of its elderly policy and considers it as a kind of social activity in the country.

7.6 While the Chinese Government's policy direction towards elderly education is clear, its role and strategy is worth noting. Instead of playing a direct participating role in the provision of education services to older persons, *the Government policy is inclined to encourage non-government organizations (e.g. local groups, enterprises and private foundations) to offer the services and its role is just limited to monitoring and providing support in several forms (including seed money, venues, subsidies) as appropriate.*

Elderly Universities/Colleges

7.7 The first structured institute for the elderly in China is the **Shan Tung Red Cross Elderly University** (山東省紅十字會老人大學) which was set up by the Red Cross (a voluntary organization) in September 1983 (Lai, Tse & Tang, 1995). The establishment of this elderly university resulted from the Red Cross's follow up action and lobbying after an elderly conference in Vienna in July 1982. In the

subsequent years, this concept and practice has gained widespread acceptance quickly and various elderly Universities/colleges have been established in different parts of the country.

7.8 Unlike the U3A in other countries, *elderly universities in China are divided into different levels, i.e. city (市), district (區), county (縣) and council (局)*. There are also branches of elderly universities (老人大學分校) and street-level elderly schools (街道舉辦的老人學校).¹⁵ This multi-level system offers the following advantages:

- a. Local resources including teaching staff, venue and funding can easily be used. Generally, Chinese enterprises and universities are more willing to support local elderly universities because they consider this a contribution to their communities.
- b. Courses can be developed to better fit the needs of local older persons. For instance, the elderly universities in rural areas would develop courses about advanced agricultural skills rather than courses in personal financial investment which are more suitable for senior citizens in cities.
- c. Courses are offered nearby and this reduces older persons' inconvenience of traveling a long distance to attend classes.

7.9 In line with the rapid technological development, elderly universities have also started to *make use of advanced technology in their services*. This can be reflected by the following cases in Shanghai:

- a. With the joint effort of the City-level Committee for the Elderly (市老齡委員會), Shanghai Elderly University (上海老人大學) and Shanghai Television University (上海電視大學), the **Shanghai Air Elderly University (空中老人大學)** was founded in October 1995. To serve older persons who are not mobile or who are living in remote areas where qualified teachers are lacking, this University broadcasts its courses on television. The courses broadcasted include elderly health and disease prevention, social psychology for the elderly, legal rights and protection for the elderly, podiatric care for the elderly, nutrition and diet for the elderly, etc. At present, there are on average about 300,000 elderly taking a course via television (Chow, 2001).
- b. In October 1999, the **Shanghai Web-based Elderly University(網上老人大學)** was founded (Chow, 2001). Advanced technology was used to develop and deliver course materials. The first course, "Elderly Health and Disease

¹⁵ Taking Shanghai as an example, there are 4 elderly universities at city level, 52 at district- /country- /council-level, 270 at street level and 2,436 elderly school branches (Chow 2001).

Prevention”, was well accepted by the students.

7.10 There are limited official statistics about the elderly universities’ activities. Nevertheless, to some extent, the following information obtained in the literature may provide a snapshot of the rapid development of elderly education and its popularity in China:

- a. Lai, Tse & Tang (1995) report that the numbers of elderly universities/colleges and students in 1985 were respectively 71 and 30,000. These numbers increased to 289 and 100,000 in 1987, and further to 3,100 and 300,000 in 1991.
- b. Jarvis, Holford & Griffin (1998) provide that in 1994, 5,000 elderly institutes were sponsored by private foundations.
- c. In 2000, it was reported that there were over 260,000 enrolments at all levels of elderly education in Shanghai, about 11% of its elderly population of 2.36 million (Shum, 2001).
- d. Chow (2001) estimates that about 8% of the elderly in rural areas¹⁶ are participating in continuing education.

Characteristics of China’s Elderly Education

7.11 The characteristics of China’s elderly education can be briefly summarized as follows (Lai, Tse & Tang, 1995; Chu, 2001):

Societal Collaboration

7.12 Probably due to the high cultural value and respect placed on older persons, elderly education is well supported in both public and private sectors at all levels. The operation of the elderly education can be considered as a masterpiece of social collaboration. In addition to the Committees for the Elderly at various levels, different organizations (including the Government’s Education Department, Employment and Manpower Department, Finance Department, enterprises, working units, community groups and elderly groups themselves) also provide support to elderly education by means of providing administrative costs, teaching staff, venues, equipment, etc.

Curriculum Design

7.13 The curriculum of continuing education for older persons is designed according

¹⁶ Note that about 80% of the population are living and working in rural areas where the illiteracy or semi-illiteracy rate is estimated to be 82% (Tracy 1991). Despite their low education level, the rural population tends to be keen on studying.

to their practical needs and societal needs. *Usefulness* is the underlying concern. Special attention is given to the physical and psychological characteristics of the elderly, the limitation of local resources and the benefits to society. Courses are developed at various levels in order to suit the diverse needs of older learners. Generally, there is no formal system to approve the curriculum and the teachers (most of them are older persons themselves) can decide the curriculum in consultation with the students.

Funding

7.14 In China, elderly education is basically offered by non-government institutes.

These institutes are mostly sponsored by private foundations and their funding comes mainly from donations and partly from course fees. In addition, the Government may provide seed money for their establishment and a fixed subsidy to support their daily operations (Lai et al., 1995). In some cases, local government departments also financially subsidize the elderly universities by setting aside a portion of their income derived from organizing community services and adult education activities.

7.15 Notably, the philosophy underlying the provision of elderly education in China is slightly different from that of other countries. In other countries like Finland, elderly education is mainly taken as a means to enhance older persons' adaptability, reduce their dependency, and thus improve the quality of their life. However, in China, besides this, *equal emphasis is also put on older persons' contribution to society*. With the concept of "Elderly could serve the community 老有所為", elderly education in China also *appreciates older persons' ability to transmit their knowledge to the next generation*. In many cases, the curriculum is designed with concern to practicality in respect of older persons' potential contribution to the family by handling household chores, and to society by working in a small business or participating in civic affairs. To some extent, this phenomenon can be reflected by the report of the Beijing Retired People Association (北京市退休人才開發中心) that more than 30,000 older persons returned to work in 6,000 organizations after re-training from 1986 to 1996 (Ma, 1998).

8. Questionnaire Survey

8.1 To obtain more direct responses from older learners and elderly education providers, a questionnaire survey was conducted as a supplementary measure to examine the 4 countries' experience in continuing education for older persons. Two sets of questionnaires were developed, one for older learners (*Appendix I*) and another for providers of education for the elderly (*Appendix II*).

8.2 Specifically, the survey aims to collect the feedback of older learners and providers of education for the elderly (basically U3As) on several aspects, e.g.

- a. Older persons' learning experience and difficulties
- b. Older learners' preference in continuing education
- c. Older persons' teaching experience and difficulties
- d. Effective channels for promoting continuing education for older persons
- e. Responses to public policy on continuing education for older persons
- f. Difficulties encountered by the providers

Data and Sample

8.3 There are plenty of organizations offering learning opportunities for older persons in the 4 countries. Due to resource constraints, the survey only focused on the I.L.R.s in the U.S. and the U3As in the U.K., Finland and China. Based on information from the internet, a sample of 15 I.L.R.s and 15 U3As was selected randomly in the U.S. and the U.K. respectively. In addition, all 9 U3As in Finland and the 2 U3As in the two major cities in China (namely Shanghai Elderly University and Beijing Elderly University)¹⁷ were included in the survey. Each provider selected in the U.S., the U.K. and Finland was sent 1 questionnaire to its head/administrator and another 30 questionnaires to its older learners. For the two elderly universities in China, a total of 550 questionnaires were sent to their learners in addition to the questionnaire for their heads/administrators. *Table 3* shows the numbers of questionnaires sent out and returned in each country. The overall response rate was 35%.

8.4 Due to the small sample size in most cases of the survey, great care must be taken when interpreting the results.

¹⁷ There were great difficulties in getting the contact list of the U3As in China. The two were selected because of some personal connections of the research team.

Table 3: Response Rate of Questionnaire Survey

| | Elderly Learners | | Administrators / Heads | | Total | |
|--------------|---------------------|--------------------------|------------------------|--------------------------|---------------------|--------------------------|
| | Questionnaires sent | Questionnaires completed | Questionnaires sent | Questionnaires completed | Questionnaires sent | Questionnaires Completed |
| U.K. | 450 | 60 (13%) | 15 | 4 (27%) | 465 | 64 (14%) |
| U.S.A. | 450 | 52 (12%) | 15 | 4 (27%) | 465 | 56 (12%) |
| Finland | 135 | 62 (46%) | 9 | 1 (11%) | 144 | 63 (43%) |
| China | 550 | 386 (70%) | 2 | 2 (100%) | 552 | 388 (70%) |
| Total | 1,585 | 560 (35%) | 41 | 11 (27%) | 1,626 | 571 (35%) |

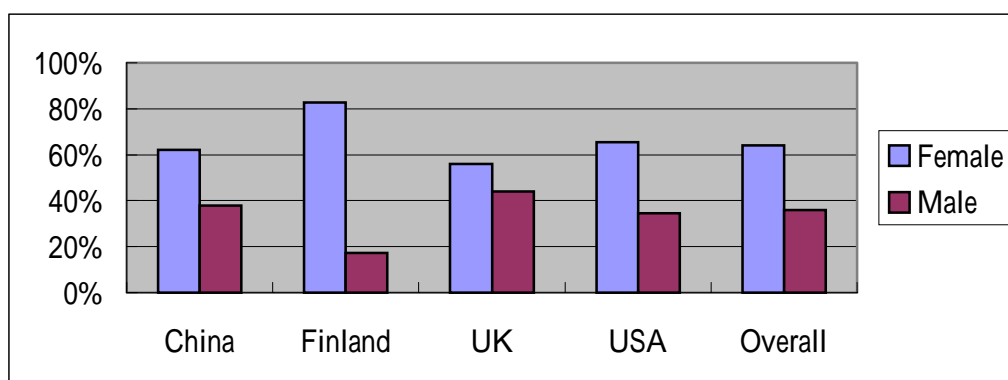
Note: The percentages in parentheses are response rates.

Responses from Older Learners

Respondents' Background

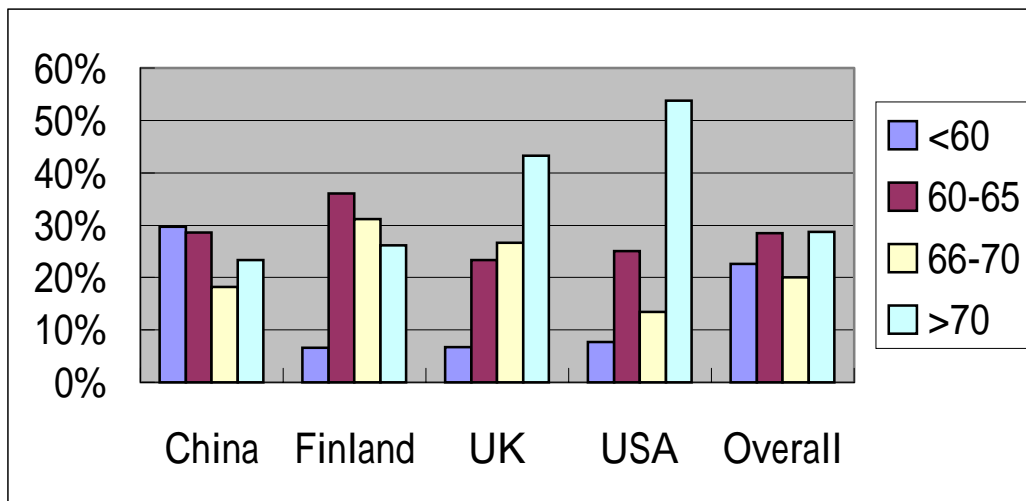
8.5 Among the respondents, 64.1% are females and 35.9% are males (*Figure 3*). The majority (over 77%) of them are aged 60 or over.¹⁸ As shown in *Figure 4*, the percentage of older learners above 70 is the highest in the U.S. (53.8%) and the U.K. (43.3%) while the respondents in China are found to be younger, with 29.7% being below 60 and 28.6% between 60 and 65. To some extent, this may indicate a cultural difference that the Western senior elders are more active than the Chinese ones.

Figure 3: Gender of the Respondents



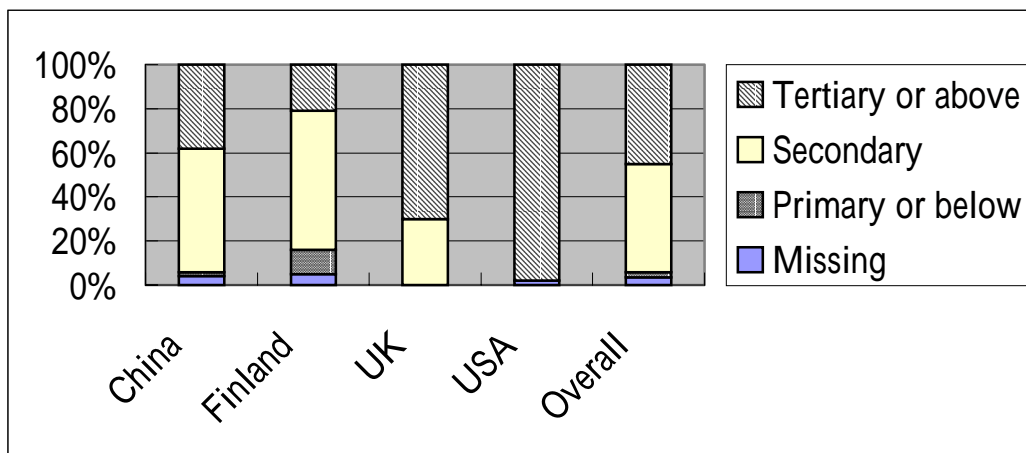
¹⁸ The overall age distribution is 22.6% (below 60), 28.5% (60-65), 20.1% (66-70) and 28.7 (above 70).

Figure 4: Age Distribution Of The Respondents



8.6 *Figure 5* gives the highest education background of the respondents. It is interesting to note that the U.S. older learners have the highest education at tertiary level (98%) while the majority (about 56%) of China’s older learners attained secondary education.¹⁹

Figure 5: Highest Education Level Attained



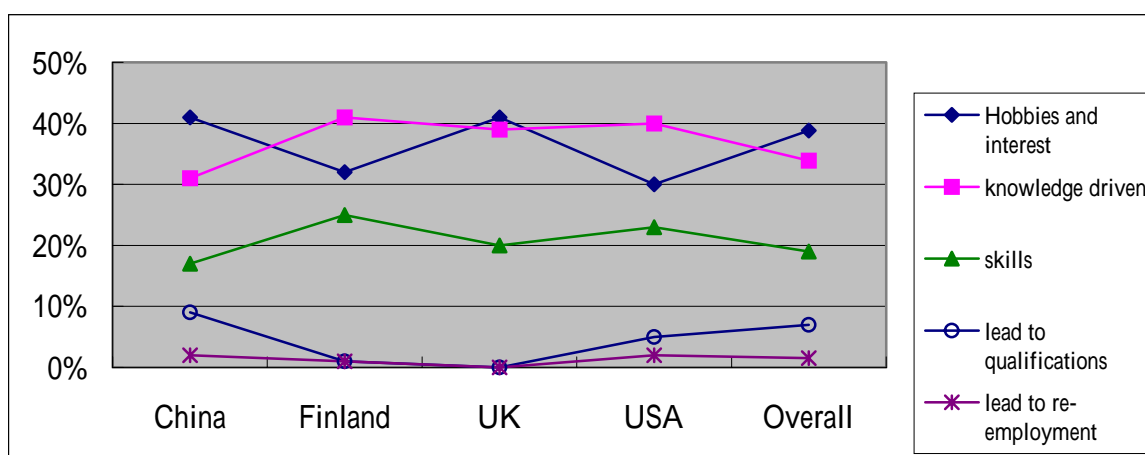
Study Preferences

8.7 *Figure 6* displays the respondents’ study preference. Several courses are given for selection and these can be categorized into 5 groups for analysis:

¹⁹ The secondary education background of China’s respondents may be due to the bias of selecting two large cities (Shanghai and Beijing). If other undeveloped rural areas had been covered, the education background might have been lower.

- a. Hobby and interest courses (e.g. painting, dancing)
- b. Knowledge driven courses (e.g. language, health care)
- c. Skills courses (e.g. computer, home maintenance)
- d. Courses leading to recognized qualifications
- e. Courses leading to re-employment

Figure 6: Study Preference



8.8 In general, *“hobbies and interests”* and *“knowledge driven”* course categories are the most popular among older learners in all 4 countries. About 30%-40% of the respondents indicate that they are interested in courses in these categories. In contrast, very few older learners (less than 10%) are studying for qualifications or re-employment.

Learning Experience and Difficulties

8.9 The literature documents the benefits of continuing education for older persons. In the survey, all respondents show that they benefit from education one way or another. The benefit most frequently indicated by older learners is “gain some knowledge”, followed by “develop personal interest/hobbies”, “make life more productive” and “meet more people”.

8.10 Older learners often encounter several difficulties in their studies and these difficulties are reported in *Table 4*. Lack of time (27.2%), traveling problems (26.5%) and health/physical problems (23.3%) generally appear to be the common difficulties faced by older learners in their studies, though the degrees of their difficulties vary from country to country. Except for China, financial problems are not considered as a serious problem. This may be related to factors such as the

economic development of related countries, funding of U3A activities etc.

Table 4: Difficulties Encountered By Older Learners

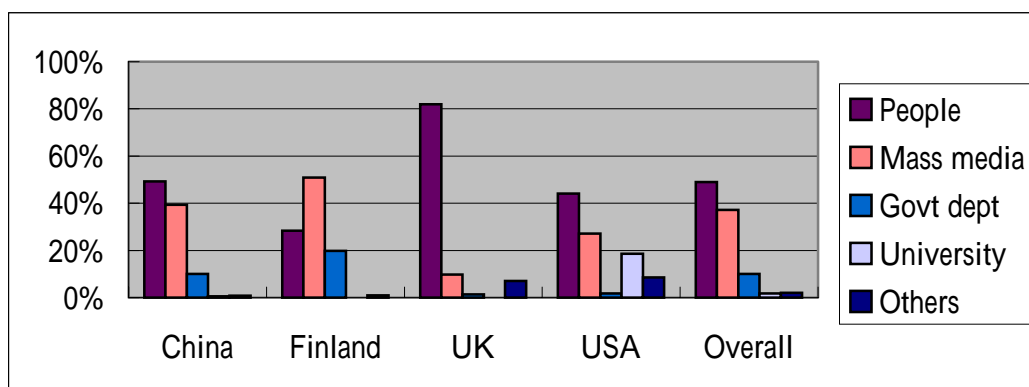
| | China | Finland | U.K. | U.S.A. | Overall |
|-----------------------------|-------------------|------------------|------------------|------------------|-------------------|
| Lack of time | 92 (23.7%) | 13 (16.2%) | 25 (61.0%) | 14 (73.7%) | 144 (27.2%) |
| Traveling problems | 107 (27.5%) | 26 (32.5%) | 4 (9.8%) | 3 (15.8%) | 140 (26.5%) |
| Health / Physical problems | 86 (22.1%) | 33 (41.2%) | 4 (9.8%) | 0 (0%) | 123 (23.3%) |
| Financial problems | 74 (19.0%) | 1 (1.3%) | 1 (2.4%) | 2 (10.5%) | 78 (14.7%) |
| Cannot follow teaching pace | 30 (7.7%) | 7 (8.8%) | 7 (17.0%) | 0 (0%) | 44 (8.3%) |
| Total | 389 (100%) | 80 (100%) | 41 (100%) | 19 (100%) | 529 (100%) |

Sources of Information about Elderly Education

8.11 *Figure 7* shows that about half of the respondents know about the U3A courses and activities through their friends, family members and relatives, indicating that *“word-of-mouth” is the most effective means of promoting elderly education.* The channels of mass media such as newspapers and magazines (20.5%) and T.V. and radio (16.7%) are also widely used by the elderly to obtain information. The governments’ promotion seems not to be effective as there are only 10% of older learners who obtained information through this channel.

8.12 Notably, as compared with the other three countries, Finnish older learners obtain information in a slightly different way. They rely more on mass media (50.9%) to obtain information about U3A courses, with the channels of through other people (28.3%) and government departments (19.8%) being the second and third popular sources respectively.

Figure 7: Information Sources of Elderly Education



Teaching Experience

8.13 One of the U3As’ features is self-help learning. Most courses are peer-designed and peer-led. In the survey, older learners were asked about their teaching experience of U3A courses. Surprisingly, only 13.8% respondents indicate that they have taught U3A courses, mainly in the categories of “knowledge driven courses” (e.g. languages) and “hobbies and interest courses” (e.g. dancing). Probably due to the higher education background of the respondents, both the U.K. (50%) and the U.S. (34.6%) have a higher proportion of learners with teaching experience than Finland (8.1%) and China (7.0%).

8.14 Teaching seems to provide satisfaction to participants too. *Among those learners with teaching experience, almost all indicate that they are happy with the experience and find it challenging.* Half of them express several difficulties (e.g. designing curriculum/materials design, communication with administrators and students, class management) encountered in their teaching and the largest difficulty is related to the facility used for teaching.

Suggestions for Improving U3A Courses

8.15 *Table 5* shows the suggestions made by the respondents about how to improve the quality of U3A courses. With the exception of the U.S., older learners in the other 3 countries generally opine that governments should provide support in terms of funding and venue. In contrast, the U.S. respondents think that universities should run U3A courses with government subsidies and help in curriculum design and teaching.

Table 5: Older Persons’ suggestions on how to improve quality of U3A courses

| | China | Finland | UK | USA | Overall |
|-----------------------------------------|-------------------------------|-----------------------------|-----------------------------|----------------------------|-------------------------------|
| Government | | | | | |
| Provides financial support | 288 (27.4%) | 32 (24.2%) | 23 (22.8%) | 1 (2.2%) | 344 (25.9%) |
| Provides venue support | 184 (17.5%) | 21 (15.8%) | 30 (29.7%) | 4 (8.8%) | 239 (18.0%) |
| Develops some policies to support U3A | 167 (15.9%) | 10 (7.6%) | 21 (20.8%) | 3 (6.7%) | 201 (15.1%) |
| Provides staffing support | 111 (10.6%) | 10 (7.6%) | 10 (9.9%) | 3 (6.7%) | 134 (10.1%) |
| Universities | | | | | |
| Run U3A courses with government subsidy | 111 (10.6%) | 27 (20.5%) | 4 (4.0%) | 13 (28.9%) | 155 (11.7%) |
| Help in curriculum design | 103 (9.7%) | 20 (15.2%) | 6 (5.9%) | 16 (35.6%) | 145 (10.9%) |
| Non-government organizations | | | | | |
| Run U3A courses with government subsidy | 88 (8.3%) | 12 (9.1%) | 7 (6.9%) | 5 (11.1%) | 112 (8.4%) |
| TOTAL | 1,052 (100%) | 132 (100%) | 101 (100%) | 45 (100%) | 1,330 (100%) |

Responses from Providers

8.16 Given the low response rate and small sample size in this part, it is extremely difficult (and also dangerous) to generalize about results from the respondents. Nevertheless, the feedback collected generally seems to be consistent with the information about each countries’ U3As (e.g. in respect of funding, operation, curriculum development) documented in the literature. In addition, some striking observations can be noted as follows:

- a. All respondents in the U.K. and China think that there is a government policy of education for older persons in their countries, while all respondents in the U.S. and Finland think that no such policy exists.
- b. All respondents in both the U.K. and China indicate “improving older persons’ quality of life” as their government policy objective of elderly education.

- c. When asked about their governments' attitude towards education for older persons, all respondents in the U.K., China and Finland and half in the U.S. opine that their governments are predominated by the attitude "to encourage non-government organizations to offer elderly education".
- d. Most respondents still rely on mass media (in particular newspapers and magazines) as the major channel to promote U3A courses and few take word-of-mouth as a promotion means. This is different from the responses of older learners.

9. Summary and Conclusions

9.1 Based on the examination of the 4 selected countries' experience in elderly education in the previous chapters, this chapter identifies some useful and relevant features for local reference and discusses the implications for Hong Kong's development of elderly education.

General Phenomena Observed

9.2 The *world population is ageing*. The number and the proportion of the elderly population are increasing rapidly in both developed and developing countries.

9.3 There is a long recognition that as the *ageing population* increases the needs for social help, more inactive and dependent older persons will *have greater implications to society* in terms of pensions, welfare, health and long term care costs.

9.4 In both the literature and individual countries' policies, there exists a consensus that *continuing education may preserve older persons' physical and cognitive functional ability, and enhance their adaptability and appreciation of life, thus reducing their dependence on family and government support*.

9.5 Instead of viewing older persons as a burden, *a more positive attitude to appreciate older persons' experience and knowledge as a resource to the society is being developed* (e.g. in the U.S., Finland and China). In this connection, the idea of promoting intergenerational integration in elderly education (e.g. in the form of intergenerational programmes / inter-age university) is being implemented / explored.

Features Identified

Public Policy

9.6 In the countries studied, *the development of elderly education policy is generally related to their demographic shifts* (e.g. the U.K. and the U.S.) *and built upon the concept of lifelong learning* (e.g. the U.S. and Finland). Elderly education policy evolves mainly as a result of an awareness of ageing population and subsequent recognition of the benefits of education for older persons, and the promotion of lifelong learning. The *main policy objective is to improve the*

quality of older persons' life through learning, with the ultimate aim of reducing their dependence on social support. Unlike youth education, the link of education for older persons to unemployment seems to be irrelevant.

9.7 *Though different in form and degree, each government has shown commitment and support to continuing education for older persons in its policy.* For instance, the U.K. Government has the Inter-Ministerial Group on Ageing to coordinate its policy and planning about elderly education across all departments. The U.S. Government has the Lifelong Learning Act enacted in 1976 to encourage older persons' learning. In China, there is the National Working Commission on Ageing established to be responsible for evaluating ageing policy and liaising with related government departments. In Finland, the government has covered elderly education in its constitution, acknowledged the importance of learning for older persons in its education development plan, and supported the U3As through its open university in the university system.

9.8 *Most countries (e.g. U.K. and Finland) generally take elderly education as part of their education policy and put it under the jurisdiction of their education authorities.* Nevertheless, these countries are aware of the relationship of elderly education and other areas (e.g. social welfare, health care), and so *central mechanisms/organizations are made available to facilitate policy communication and coordination among different related departments (e.g. health authorities) and sectors.* A typical example is the Inter-Ministerial Group on Ageing in the U.K. Even China, which does not include elderly education in its education policy/system, also has the National Working Commission on Ageing as a central coordinating and monitoring body.

9.9 *Except for Finland, most countries' education policy is biased against older persons.* This may be reflected by the fact that their education systems generally take care of the learning needs of the younger generation and tend to treat elderly education as part of adult education. In these countries, a majority of specific education services for older persons have been developed outside the education system with less government involvement and support.

9.10 Each government's *attitude towards, and model of funding elderly education is different.* Some countries provide financial support, either specifically or through formal or adult education, and some leave the elderly education providers to be self-financing. In all cases, providers need to rely on other sources of finance (e.g.

private sponsorship and donations, membership fees and course fees, etc.) to different extents.

- a. In the U.K., an independent trust is set up with members' fixed annual contributions to support U3As' activities, which are carried out on a voluntary and unpaid basis. The trust receives no financial support from national or local government.
- b. In the U.S., the impetus and financial support of elderly education mainly comes from the non-government sector.
- c. In China, the government supports some elderly universities by a fixed subsidy.
- d. In Finland, the U3As are treated as a special form of open university education in the university system and mainly financed by the State through funds allocated to the universities out of its education budget.

Training Curriculum

9.11 The countries selected all provide general education and specific education for older persons. *General education* services for older persons are offered as part of adult education and mainly include vocational training and tertiary education. As most of these are "for-credit" classroom teaching geared to adults of all ages, they *do not fit into the interest and learning needs of most older persons and thus attract very limited participation*. In contrast, *specific education for older persons is far more popular*.

9.12 With regard to for-credit education offered in the 4 countries, the *open university model* seems to be very *appealing to those older persons who would like to earn a credential of some sort*. This may be attributed to its flexibility of open and distance education, which offers learners convenience in terms of learning timing, pace, location, etc.

9.13 *U3As* seem to be the *most popular name/form* used by organizations offering specific education for older persons.

9.14 There are *a wide variety of specific education activities and services provided for older persons* in the 4 countries. In general, these activities and services have the features of being more individualized and self-paced. They may be teacher-directed (e.g. Elderhostel programmes in the U.S.) or peer-based (e.g. U3As programmes in the U.K. and Finland, I.L.R. courses in the U.S.). They may also take several forms (e.g. courses, lectures, seminars, tours, recreation etc.) in a

wide range of topics.

9.15 It is observed that *courses accompanied by extracurricular activities and provision for social interaction are much more welcomed by older persons*. Taking the success of the Elderhostel programmes in the U.S. as an example, the traveling arrangements bring older learners to a new environment to learn new events or new culture. In learning, they gain psychological support from each other as they are accompanied by the same age group. At the same time, they can also make more friends during the journey.

9.16 Basically, the provision of specific education for older persons *follows the principle of open education*. It is open to all and there are no admission requirements. In addition, *almost all specific education for older persons is found to be structured as non-credit, without assessment and grades, and not leading to formal qualifications*. The aim appears obviously to enhance participants' physical, psychological and social health as well as to understand the changes in the surrounding world, rather than training them for qualifications or reemployment.

9.17 The *involvement of older persons in curriculum development is significant*. In both the U.K.'s U3As and the U.S.'s ILRs, programme curriculum and learning activities are developed by members. In Finland, the U3A programmes are designed jointly by older learners and university academic staff. In China, students are also being consulted for curriculum design. The only exception is the Elderhostel programmes which are planned by expert-educators. There are several advantages of getting older persons involved in curriculum development and teaching, e.g.

- a. To encourage older learners' personal initiative
- b. To enhance their commitment to elderly education
- c. To have curricula better developed to fit the interests and learning needs of older persons.

9.18 The *subject areas of special education for older persons are very wide*. Examples of the popular areas include arts, humanities, IT, health care, interdisciplinary studies, community and intercultural issues, etc. The questionnaire survey indicates that *hobbies and interest courses and knowledge driven courses are generally more welcomed by older learners (who seldom take courses for the purpose of qualifications/reemployment), regardless of the older*

learners' educational background.

9.19 There is *no fixed course arrangement*. Study is generally part-time, with classes offered in the daytime, evenings, or weekends.

Teachers

9.20 In the countries studied, U3A is basically taken as a form of self-help learning among older persons and courses are mostly peer-designed and peer-led. *The majority of teachers are learners themselves*. Occasionally, outsiders such as university teachers are invited to give a lecture or a course.

9.21 There is *no specific training provided to the teachers* for continuing education for older persons. Neither the literature nor the surveys reveal any particular problems resulting from a lack of teacher training. This may be attributed to the following possible reasons:

- a. Most elderly education courses are casual in that they are not for credit, qualifications or awards and thus their forms, levels and arrangements are subject to less constraint. Teachers can deliver whatever knowledge they have and whatever the learners are interested in. This flexibility makes both teaching and learning more interesting and enjoyable, thus watering down the necessity and importance of teacher training.
- b. Teachers themselves are also older persons with abundant life experience. They well understand the interests and needs of older learners and know how to handle learning issues.

9.22 The survey shows that among those *learners with teaching experience*, they are happy with the experience and *find teaching challenging*. This suggests that teaching as well as learning can provide satisfaction to learners.

Implications

9.23 The findings may have some implications for Hong Kong in formulating appropriate measures to promote lifelong learning opportunities for older persons.

- a. Continuing education for older persons is beneficial to both older persons themselves and the society as a whole. In view of the rapidly ageing population, *a policy on elderly education is urgently needed* in order to improve the quality of their life and reduce the burden on society.
- b. To ensure that learning provision is an integral part of support services for older persons and is planned adequately at different levels, *the policy for*

elderly education should be cross-sector and cross-department. In this respect, *a central mechanism/body* (like the Inter-Ministerial Group on Ageing in the U.K. and the National Working Commission on Ageing in China) *may be required to facilitate policy planning, communication and coordination among different related parties.*

- c. Among other things, the policy should cover
- the strategies to *encourage participation in educational programmes by older persons* (e.g. by means of advertising the potential values of continuing learning, tuition waiver programmes, giving cash subsidies, enhancing social benefits, etc.);
 - the strategies to encourage the *development of special organizations* (e.g. U3As, ILRs) that offer elderly education as a primary task and can provide leadership to this field;
 - the framework to ensure the *quality of educational programmes* for older persons (e.g. setting some standards/guidance for evaluating elderly education providers, teachers and programme curricula);
 - the strategies to spell out the *Government's long-term commitments* to elderly education;
 - the strategies of *providing resource support* (both financial and non-financial) to providers of education for the elderly and older learners.
- d. Older persons are as keen to learn as anyone else but prefer informal learning. Since it shows in other countries' experience that formal education and adult education cannot satisfy the learning needs of older persons, *the future development of elderly education in Hong Kong should focus on specific education activities for older persons. The specific elderly education may be more appropriately structured as non-credit courses consisting of extracurricular activities and provision for social interaction, with no requirements of admission and assessment.*
- e. To ensure the quality of elderly education, to offer better support in programmes and to provide older learners with greater confidence and encouragement, *universities (or their continuing education units) may be invited to participate in the provision of specific elderly education* (e.g. setting up U3As). Other organizations if interested may collaborate with the universities, regardless of whether they are voluntary, non-profit or profit-making organizations.
- f. For a small proportion of older persons who would like *to study for formal qualifications/awards, the distance education offered by the Open*

University of Hong Kong may be promoted. In this respect, a tuition discount/waiver programme should be considered as an encouragement/support to the older learners.

- g. As most older persons are financially dependent, elderly education programmes, if offered on a full cost recovery basis, would certainly be beyond their reach. To promote elderly education, *government support (e.g. subsidies, venues, facilities or other forms as appropriate) is certainly needed.* In addition, to reduce the costs involved and to benefit older learners, proper arrangements should be made to *get older learners themselves involved in the process of curriculum development and delivery.*

9.24 It becomes evident that people are no longer retiring from active responsibilities to immediate death, but are increasingly living longer, with more time to do other things. Older persons are as keen to learn as anyone else and lifelong learning should not be an issue confined to youngsters or working adults but an integral part of all learning. Hong Kong's population is ageing but education for older persons is yet to be developed. As learned from other countries' experience, development of elderly education, to a great extent, should be taken as a government policy rather than leaving it to evolve naturally as education for older persons benefits not only older persons themselves but also the community as a whole. In this respect, development of elderly education should not be confined to social policy, but rather it should be incorporated into other policies like housing, health and education. It is suggested that the Hong Kong Government should develop such an integrated policy to promote elderly education for the benefit of Hong Kong's future as soon as possible.

References

Administration on Aging (2001) <http://www.aoa.gov/aoa/PAGES/aoa.html>

Brockett, R.G. (1985) "Relationship Between Self-Directed Learning Readiness And Life Satisfaction Among Older Adults", *Adult Education Quarterly*, 35(4) Summer, 1985, pp. 210-219.

Bureau of the Census, the United States, (2001)
<http://emuseum.mnsu.edu/information/population/index.php>

Carlton, S. and Soulsby, J. (1999) *Learning To Grow Older And Bolder: A Policy Discussion Paper On Learning In Later Life*, The National Institute Of Adult Continuing Education (NIACE), Oryx Press, United Kingdom.

Chow, L. (2001) "Increase The Quality Of Life Among Elderly – Review On Shanghai Elderly Education Centres", Shanghai Loanian Daxue 15th Anniversary Memorial Journal. (In Chinese)

Chu, K. F. (2001) "Important Measures To Increase The Quality Of Life Of The Elderly: Development Of Elderly Education", Paper For 2nd International Symposium On Chinese Elderly In Shanghai, October 2001. (In Chinese)

Dooghe, G. (1992) *The Ageing Of The Population In Europe: Socio Economic Characteristics Of The Elderly Population*, Brussels.

Eisen, M. J. (1998) "Current Practice And Innovative Programs In Older Adult Learning", in Fisher, J. C. & Wolf, M. A. (Ed.), *New Directions For Adult And Continuing Education*, No. 77, Spring, pp. 41-51.

Harris, D. & Cole, W. (1980) *The Sociology Of Aging*, Dallas: Houghton-Mifflin.

Hiemstra, R. (1994) "Lifelong Education And Personal Growth", in Monk, A. (Ed.), *The Columbia Retirement Handbook*, NY: Columbia University Press, pp.525-548.

Hopp, R. (1998) "Experiencing Elderhostel As Lifelong Learners", *Journal Of Physical Education, Recreation And Dance*, April 1998, 69(4), p.L1(2).

Hurlbut, N. (1988) "The Influence Of Vicarious Experience On Self-Efficacy And Learning Of Senior Adults", *Canadian Home Economics Journal*, 38(3), pp.137-141.

Jarvis, P. (2001) *Learning In Laterlife*, Kogan Page.

Jarvis, P., Holford, J. & Griffin, C. (1998) *The Theory And Practice Of Learning*, Sterling, London.

Kelly, P. (1989) "Research Into Older Students: A Progress Report From The Older Research Group", *Research In Distance Education*, 1(3), pp.2-3.

Killoran, et al. (1997) *Promoting the Health of Older People*, Health Education Authority.

Lai, S.M., Tse, A.P. & Tang, W. L. (1995) "Elderly Education In Mainland China", *Adult Education In China*, Kao Ah Fook Man Publisher. China, pp.427-447.

Lamdin, L. & Fugate, M. (1997) *Elderlearning: New Frontier In An Aging Society*, Oryx Press, Arizona.

Leaf, R. (1994) "University Of The Third Age: Stretching The Boundaries – A Self-Resourced Coalition For Learning", in *Stretching The Boundaries: A Quarterly Experience*, Australian Consortium On Experiential Education, 32, p.25.

Ma, S. P. (1998) *Establishment Of Lifelong Education System: Practice And Research On Beijing Adult Education*, People Educational Publisher, China. (In Chinese)

MacNeil, R.D. (1998) "Leisure, Lifelong Learning And Older Adults: A Conceptual Overview", *Journal Of Physical Education, Recreation And Dance*, 69(2), pp. 26-29.

Manheimer, R. J., Snodgrass, D.D., Moskow-Mckenie, D. (1995) *Older Adult Education: A Guide To Research, Programs And Policies*. Westport, Greenwood Press, Conn.

Ministry of Education, Finland (2001) www.minedu.fi.

National Center for Education Statistics (2001) <http://nces.ed.gov/pubsearch>

National Education Association (2001) <http://www.nea.org>

National Institute of Adult Continuing Education (2001) <http://www.niace.org.uk>

Selehon, G., Cox, H. & Rathee, R. (1983) "Education And The Elderly In America", *Indiana Academy Of Social Science Proceedings*, 18, pp.158-166.

Shum, C. S. (2001) "Review And Expectation On The Quality Of Life Of Shanghai Elderly", Paper For 2nd International Symposium On Chinese Elderly In Shanghai, October 2001. (In Chinese)

Swindell, R. & Thompson, J. (1995) "An International Perspective On The University Of The Third Age", *Education Gerontology*, 21, pp.429-447.

The History of Elderhostel (2001) <http://www.elderhostel.org>

The Third Age Trust, United Kingdom (2001) <http://u3a.org.uk>

Third Age Universities In Finland. (2001).
<http://www.avoinyliopisto.fi/english/engikis.html>

Tracy, M. B. (1991) "The People's Republic Of China: Decentralized Government Programs For The Elderly", *Social Policies For The Elderly In The Third World*. New, Greenwood Press, York.

Tso, K. (2001) "Protection Of Older Persons' Right For Education: Better Organization In Schools For The Elderly", Paper For 2nd International Symposium On Chinese Elderly In Shanghai, October 2001. (In Chinese)

United Nations (1996) *Lifelong Preparation For Old Age In Asia And The Pacific*, p.50

The University of the Third Age, Mansfield and District (2001)
<http://homepages.which.net>

World Health Organisation. (1998) <http://www.who.int/inf-fs/en/fact135.html>