

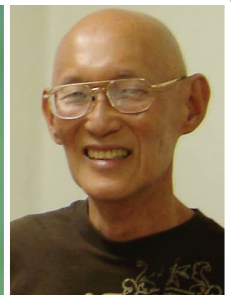
# The *Review*

Volume 1

Fall 2006

The Annual Journal of the Osher Lifelong Learning Institutes

Explorations by and  
about older learners



## In this issue:

- Research and Theory
- Life Stories
- Best Practices
- Poetry
- Learning Resources

a program of



## *The **LLI** Review*

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## Welcome to *The LLI Review*

**Y**ou are holding in your hand—or perhaps reading online—the inaugural edition of this communication vehicle for the Osher Lifelong Learning Institutes (OLLI). Welcome to our new journal.

You may be asking, “Does the world really need yet another journal?” About 18 months ago, in part to answer this question, I undertook a modest research project involving a small sample of Osher Institutes. The focus of the survey was two-fold: Would there be interest in having an OLLI Network journal and, if so, what would be its preferred content? One respondent actually took the time to answer with the following sentence: “I think creating a journal about older learners would be a waste of time and money.” While I appreciated this individual’s candor, that singular voice of disapproval was not enough to cancel this project! (Or even my enthusiasm for it.)

Nearly everyone else who responded to the survey enthusiastically supported the idea of creating an OLLI journal and offered suggestions for what they would like to see in it. For the most part Volume 1 of *The LLI Review* incorporates the content suggested by our colleagues.

In the current domain of scholarly literature there is nothing quite like *The LLI Review*. It is possible, of course, to locate recent research about aging and education in the well-regarded journal, *Educational Gerontology* (in which numerous members of OLLIs, including me, have published). On occasion one can read an empirical study or literature review linking aging and education in any of a vast array of periodicals in the fields of gerontology and adult education. However nowhere that we know of, excepting an eight-page newsletter published by The American Society on Aging’s “Lifelong Education and Renewal Network,” can one find a vehicle dedicated to explorations by and about older learners. *The LLI Review* is expressly dedicated to the theme of learning in the later years and is written, reviewed, and edited by “seasoned citizens.” While the invitation to submit material to our journal was broadly issued, with the goal of welcoming contributions by any thoughtful contributor, two-thirds of the manuscripts in this volume are from members of Osher Lifelong Learning Institutes.

So what can you expect to read? Within the pages of this inaugural volume are responses from across the United States, literally from Maine to Hawaii, to a “Call for Papers” that was distributed through the OLLI Network and other national forums late

in the summer of 2005. That invitation was similar to the 2007 “Call for Papers” printed in the back of this volume to which, if inspired, I invite you to respond. As the “Call for Papers” states, this is a scholarly journal that seeks to publish research and theory. While we prefer the research we publish to have a strong link to the day-to-day activities of teaching, planning curriculum, and managing lifelong learning institutes, there will also be “best practices” articles that are intended to share interesting courses and program ideas with colleagues across our national network. Additionally, while it was never our vision to produce an arts and literature magazine, there are five poems in this inaugural volume and we hope more poetry and even short fiction on the topic of learning in the later years will be contributed in the future. Finally, an especially distinctive feature of this journal are the life stories of great teachers and learners. This section, which is managed by Associate Editor Robert Atkinson, represents the beginning of what we hope will be a long tradition of profiling and celebrating exemplary and inspiring colleagues within our network.

Every research article, essay, program description, and poem was reviewed by at least four peers prior to acceptance into the journal. We were fortunate to have had a small but highly competent and dedicated editorial review board working with us on the 2006 edition and we look forward to growing this board. (The national Osher Lifelong Learning Institutes’ conference held in San Jose, California, in April of 2006 was particularly helpful in this regard. A number of people who attended the special roundtable on *The LLI Review* have volunteered to work with us.)

One more unique characteristic is worth noting. While many publications are appearing in both print and online formats nowadays, few if any of these may be read free of charge. Most online magazines and journals are password-protected and require paid subscriptions. This is not the case with *The LLI Review*. Thanks to the largesse of the Bernard Osher Foundation there is no need to sell subscriptions or advertising and everyone—members of our national network and anyone else who is interested in the work that we do—is welcome to read our journal. While a limited number of paper copies will be printed and distributed to all Osher Institutes and selected libraries, anyone in the world may locate and read this journal through the Web site of the OLLI National Resource Center: [www.osher.net](http://www.osher.net)

I hope you will read, enjoy, and learn from *The LLI Review*. I also hope you will consider contributing to future issues—we expect to publish once per year. I welcome any feedback you may wish to provide about Volume 1 either by telephone (207-780-5312), traditional mail (Bailey Hall 400, University of Southern Maine, Gorham, ME 04038), or e-mail ([mbrady@usm.maine.edu](mailto:mbrady@usm.maine.edu)). Thank you for being part of this exciting new adventure in older adult education.

**E. Michael Brady**  
*Editor*

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## Lifespan Learners: Educational Perspectives

**Mary Alice Wolf**

### Abstract

*Factors such as increase in longevity, freedom from disease, level of educational attainment, and proportion of older adults to the general population give older adults a new identity and produce diverse patterns of development. This article presents research on older adults in the process of navigating this new terrain. All are participants in educational programs; through in-depth interviews they examine their motivation and experience of learning in late life. Looking backwards at their own lives they also develop new awarenesses, insights, and meaning of their places in the lifecycle.*

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*I see myself as a bubble floating in a stream. Changing shape, getting bigger and smaller, responding to my surroundings, arriving at a final destination, intact but changed.*

*Observation of an Older Learner*

### Introduction

Older people tell stories, retell stories, reorganize stories. These current versions of early experiences take on new meaning and reflect cumulative learning. How does aging affect these shifts and revisions of the individual life course? Older adults reinterpret daily events and past experiences; they explore new boundaries and relationships. In keeping with Erikson's (1968 and Erikson, Erikson & Kivnick, 1986) concept of the epigenetic life course, it is possible to hear individual learners reworking earlier themes of their lives. (*Note:* The "epigenetic" process means that we rework earlier conflicts and tasks throughout our lifespan.) They make new meaning and require new learning to negotiate the challenges of older adulthood (Baltes & Carstensen, 2000; Eisen, 2005; Fisher & Wolf, 2000). This article explores how personal narratives create foundations for learning in later life. It presents the world of a cohort of older learners ages, 70-93, who are adapting and reconstructing their understanding of their own development.

Older people tell stories, retell stories, reorganize stories. These current versions of early experiences take on new meaning and reflect cumulative learning.

## Lifespan Learners: Educational Perspectives

### Theoretical Underpinnings

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One constructs meaning through a dynamic interaction with events or environmental stimuli. In Robert Kegan's (1994, 1999) model of object relations, a process of "decentering" occurs. The individual has a new perspective; "making object" is the means by which one "sees" former perceptions or assumptions. In detaching from a previously held assumption, one experiences a transition in making meaning. Kegan's (1999) model for personal growth is based on a progression of these object-related perceptions. An "object" is an unconscious part of oneself: by examining, naming, and talking about it, one also separates from it emotionally. Elders then make new meaning of the life cycle.

Armin Grams, the influential gerontological educator, observed in his eighties:

What I for many years thought would be a settled and systematic journey to a clearly defined goal in life instead became a pilgrimage on which I still find myself today. The pilgrimage metaphor conveys life's open-endedness, incorporating both certainty and uncertainty...A pilgrimage is a journey that involves uncertainty and ambiguity, often taking us places we never expected to go. (Grams, 2001, p. 103)

Therefore, one constantly changes or transforms perceptions, looking at the past and creating the future, and this process continues into old age.

Learning is related to everyday needs as well as to subconscious development. In Piaget's terms, "object-related" behavior is directed at developmental needs (1968, 1969). One "studies" where one is going, to whom one is connected, and how one constructs the world at the time. This is adaptation: one refocuses on his or her place in the world and the meaning made of an event. Essentially, one creates the world according to one's developmental stance.

Older adults, too, "make object." They may be moving into new stages of life: widowhood, leisure, caretaking of grandchildren or great-grandchildren. Transitions inherent in the aging body require adaptation and an orientation to inner time (self-hood) and outer time (clock time, history) (Kenyon, Ruth & Mader, 1999, p. 45). The awareness of both personal time and the requirements of the environment provide ongoing opportunities for growth (McFadden & Atchley, 2001). Hendricks observed, "Talking creates explanatory scenarios and talking about time creates time frames that provide important referential cues" (2001, p. 39). Older adults face both loss and new directions; however, they experience themselves as basically the same (Kenyon, Ruth & Mader, 1999; Kaufman, 1986; Wolf, 1994, 2005). Their life philosophy—their narrative of self—directs their approach to living.

### The Study

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The study consists of a sample of 180 older adults (ages 70-93) living in a community and engaged in learning activities. They were interviewed in depth on two occasions using principles of phenomenological research (Berger & Luckmann, 1967; Denzin & Lincoln, 1994). The four hours of interviews per subject were tape-recorded and transcribed. Content was analyzed using an object relations perspective and an ethnographic portrait was created for each study participant. This article focuses on participants' discussions of developmental moments. Major themes selected as examples are: childhood adversity, education, wartime activities, building families, health care, and awareness of aging and time.



Each participant offered a “life philosophy,” describing a personal model for adapting to aging-related problems. Kaufman’s (1986) finding that identity is lifelong was supported. Each individual cited a personal “self” that interpreted environmental phenomena and the process that enabled him or her to learn to re-orient within personal and “clock time” (e.g., the historical context of an event in a person’s life.) Adaptation, compensation and affirmation were found to be consistent in all of the narratives (Wolf, 2005a).

The following examples from the narratives illustrate the experiences of early life being recalled and explored. It is hoped that the rich potential for learning implied in these excerpts from the study data will resonate with adult education practitioners.

The pilgrimage metaphor conveys life’s open-endedness, incorporating both certainty and uncertainty...

### Childhood Adversity

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The cohorts represented came of age in post-Depression era, most experiencing serious poverty and family catastrophes. As a result, most learned lessons early about resilience. Georgette, age 72, described without self-pity her early family circumstances:

Imagine my mother with three babies and one every year. Not too many people have done that. My poor mother. She had 12 children. She died at 51. My father was luckier; he lived to 85...I didn’t go to high school. I finished 8th grade. At 15, I had to go to work. I worked at the factory until I got married, seven years.

Sam, age 78, described his childhood as one of 8 children in a working class family referring dispassionately to abandonment by his father:

My father left the family when I was 12 years old. I never saw him again. I don’t know what happened to him, why he went or anything else. Mother kept a candle burning. It just happened that way. I have mixed emotions on it. I have never had any hard feelings about it, whatever. We survived. We’re a surviving family. My mother worked. I got out of high school, my sister got out of high school.

All of us went to work, if we made 50 cents, we gave 49 to our mother and took a penny. We all pulled together. Learning was just surviving. Now I have the luxury of pulling things together with these courses I’m taking.

The majority of participants has “made peace” (as one said) with their early lives. Ninety percent of the group had known severe adversity in childhood (desertion by a father, loss of livelihood, the loss of a parent or a sibling).

### Education

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A typical narrative of lifespan learning experience contained elements of early struggle for achievement: Caroline, age 76, recounted:

I got a scholarship because I was first in my class, I went two years, but my mother ran out of money because she quite literally spent her last \$50 to pay for my last tuition. I got engaged and then married at 19, which I had never intended. In any case, there wasn’t enough money to continue. So it was two years of college. That’s why I really need this time in life to catch up with my education.

## Lifespan Learners: Educational Perspectives

These older adult learners valued the opportunity to participate in multiple learning activities. Adaptation, compensation, and affirmation were consistent in all of the narratives.

### Historical Mandates: War

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The post War cohort had opportunities for education and housing which shaped their lives. They now see themselves within the historical framework of their times. The typical reflections experience time on two levels: inner time (personal development) and “clock time” (cohort/historical orientation). This is an example of deconstructing meaning systems to accommodate to changing environmental demands.

Henrietta, age 82, reflected:

These boys, they were boys when they went overseas, and after they came back, they had opportunities. For instance, my brother went to law school when he got out of the Army and he went to live in New York. This was the time when a lot of housing developments came. There were a whole lot of little houses on Long Island, Levittown. It was really, I think, a very wonderful time. Everybody was so glad the war was over and they could get going on their lives and whatever they wanted to do. I just remember it being very very good. I haven't thought of those years in ages: Maybe I should write about them for the kids.

Grace, age 86, recalled:

My new husband was in the Navy and for a year we lived in New York City. First of all, he was stationed there. This was after the war was over. We got an apartment there. We got an old brownstone, it was really something. He had been an English major in college and he decided that he would like to be a journalist. So he looked at the Columbia College School of Journalism and he got a job at the Journal American in New York as a copy boy. We are now talking about somebody who had been a lieutenant in the Navy. He wasn't at all pretentious. So he got a job working from midnight to seven o'clock in the morning (the lobster shift). And I got a job at Lord and Taylor's as a personal shopper. A fun job. He used to go on the subway down to lower Manhattan. I'd go to work about 8:30 and he'd be coming home from the lobster shift on the subway and I'd be going downtown. Sometimes we'd meet each other and wave to each other. I worked until about 5 o'clock, I'd guess.

Interviewees were specific and concrete in describing the early life conditions. Often they related them within the context of current adaptive challenges and affirmed their competencies using data from their own histories. Kaufman's (1986) findings that identity is lifelong were supported.

### Families and Careers

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For the post-Depression-era, World War II cohort, establishing families and building careers required full attention. Here is how Kurt, age 82, described his post-war life.

We moved 20 times in 40 years. We were out in the Island, moved three times there. We had one child still in high school. She went to school, graduated, and then we moved. The company closed the branch down and I want-

ed to quit and retire then and they said no, they wanted me for a couple more years so they moved me up here.

Edith, age 75, described the demise of her ambition when faced with family crises:

The period before I retired was really quite traumatic. Very difficult, because I lost six members of my family in less than three years' time. My husband and his mother and they died within twelve hours of each other and I was basically taking care of both of them and working. Then I sold the house and then about seven months later my daughter died very suddenly. And the next year and a half three more members of my immediate family died. It was really difficult. Everything happened all at once. Only now can I see the effect that all that had on my life.

## Health Care

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Most individuals in the data group are healthy, rarely use the health care system, and have a lifelong history of not consulting doctors, even to the point of never having had checkups. They were skeptical about health care. Octavia, age 93, remarked, "I had five children and they were all born at home. The doctor came to my house." When asked if and when she had visited a doctor's office, she answered,

I went because I had to. I didn't go for every little thing. When I had children, for one thing. And a couple of operations, like tonsils, sinus. I don't think I brought my kids to the doctor either.

Ingrid, age 73, mentioned that she had never been to a doctor's office as a child; however, the doctor came to her:

When we were kids I had to have my tonsils out and my mother was a nurse. We had this doctor who was quite heavy. I was about maybe 7, I don't remember how old. And so I had them out at home, on the kitchen table. My mother showed me exactly what he was going to do with the ether mask. So I climbed up on the table, and my only worry was that he was awfully fat. I thought, "I hope he doesn't fall on me." That's all I can remember.

Skepticism about health care emerged as a prominent theme in recollections of many participants. Caroline's story involved the loss of a daughter in 1984. She died of a brain tumor at least partly because of malpractice.

She had this sudden headache, no warning, and it became very severe. Her husband took her to a little hospital and it was a Friday night. A foreign intern was manning the emergency ward and he said "She's probably on drugs." And her husband said, "She's sick." And the intern said, "Oh no, she's probably just overdosed." And her husband finally had to take her to a bigger hospital where they immediately drew off all the fluid. She had this tumor that just got a little bit bigger and a whole bunch of fluids collected around it. As soon as they took the fluid out, the pressure stopped, but by that time, it was too late.

Harry, age 80, described his current situation:

What it is I have a structural problem in my foot and the tendonitis is only a symptom. The doctors keep treating the symptom, which is great, but it's a recurring problem. My orthopedist is a jerk.... I suggested immobilizing it because my primary care physician had said to. I think it just confirms my

Most individuals in the data group are healthy, rarely use the health care system, and have a lifelong history of not consulting doctors, even to the point of never having had checkups. They were skeptical about health care.

## Lifespan Learners: Educational Perspectives

sense of realism about the medical profession. They're not miracle workers. They're not always correct. Some doctors are better than others. I had a doctor at the VA in the outpatient clinic, a nice guy, told me a lot of jokes. Did a lot of discussion about various illness and ailments, but he never treated anything.

Sam, age 70, turned to the Internet when he had a health problem:

After the doctor said he was going to send me in for an angiogram, I went to the Internet to look it up to see how it was done, what the success rates were. On the Internet, go to Yahoo and look up health and then proceed from there.

A lively Senior Center has created a SeniorNet Computer Room. Self-directed, members of the Center take turns educating each other in its use. Sam observes:

It's just like the English system where you have a tutor. I never had that when I went to school. I am more disciplined now that when I was younger. I have a kind of schedule that I have to adhere to. I try to improve my typing skills. I'm trying to get my juggling skills back again. Studying Spanish again. Plus I'm trying to learn some new computer techniques, particularly with respect to financial software. On my own. There's no charge for this stuff.

Despite a myth that elders are submissive with health care practitioners, the study group was prone to independence and skepticism. Bert, age 79, observed:

I don't really feel I've changed. Some years ago one of my kids who was 5 years old had a toothache. I took him to the dentist and he said this hurt or that hurt. The dentist said there's nothing wrong with this tooth. I told him to take it out anyway, it wasn't a permanent tooth. He took it out and the smell was overwhelming!...He could have refused to do it, but he didn't. So we collaborated. He later told me he was wrong. And I think that's the way we need to work with lawyers, accountants, insurance agents, people you buy cars from; you have to be knowledgeable and you have to respect their knowledge.

## Self-care

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When asked about their daily routines, the study participants described rising early (often 5:00 or 6:00 a.m.) and walking a great deal. Long before the cultural fad for "wellness," this cohort developed highly structured daily routines and a commitment to physical fitness. Here is how Steve, age 84, describes his routine:

I belong to the Y, I practice aerobics. I started that about ten years ago. I walk rather vigorously and extensively from the center of town, over the mountain. A fifteen-mile hike is something I do several times a year.

He was asked, "And you visit the VA on a regular basis?" He responded, "For everything. Everybody calls me by my first name so I must go there quite a bit."

Octavia, age 93, said that her health is excellent. She once had had her appendix out and she had a corrective procedure for her eyes. She says she takes "a tonic" off and on. Here is her typical day:

I get up at 6:00 a.m. I get ready and I go to Mass every morning at 7:30. This is all English, no more French. [She is a French Canadian.] I come home, have my breakfast: cereal and sometimes egg and toast. A cup of coffee a day,

no more. A few cups of tea during the day and, once in awhile, drink milk too. And I eat vegetables and fruit.

Since 1979, I give communion twice a month, the first Sunday and the last. I do a little dusting around the church on Saturday mornings, not the rectory. Someone helps me with it ... Tuesday mornings I go bowling.

Social structure is also evident. Ironically, the oldest man and woman in the study are dating each other. Peter, age 90, and Octavia, age 93. Octavia's daughter, age 70, described the routine:

She has three definite date nights—Wednesday, Saturday, and Sunday. You cannot change those date nights. Peter bowls with her and takes her square dancing. So in between I take her supermarket shopping and other shopping.

Octavia described her understanding with Peter:

He sings his heart out, he's a good singer. He's good for me. He's very nice. He respects me and I like him too. He never touches me anywhere he shouldn't. Never, never, never. That's one thing I like about him. That's why I'm not afraid to go out with him. That man had two wives, they died. He had a girlfriend, too, and she died. I don't want to be the next one.

## Awareness of Aging

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Despite their good overall health and active lives, most study participants are conscious of age and have developed ways to cope with loss of memory and decline. Ingrid, age 73, observed:

One of the things I have problems with is realizing my age. I think I can still do the same things I did 15 years ago and I can't really. Part of it is because of my age. I get confused easily. If I start something, I have to finish it or else I lose my train of thought.

When asked if her short-term memory is less good, she replied, "Yes. And that may be just age. It's not too bad. I write things down." Another observed, "Whenever you begin the retirement process, you begin to see yourself as an older person."

The majority of the group uses some mnemonic device to help with memory. Ingrid commented, "I used to panic if I couldn't find my wallet. With the keys, we have one place we keep the keys and when you're through with the keys they go in that one place."

Participants were active physically. Here is how Paul, age 72, describes himself:

I really don't see myself that way [as old]. It's always a little startling to me. I'm in pretty good shape. Because of this knee problem, I have been less active physically, putting weight on a bit. I'm not sure how I got this knee problem, but I think I got it from playing roller hockey with guys 30 years younger than me. I got whacked with a stick.

## Life Philosophy: Models for Adaptation

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Study participants seemed to possess a personal stance, a life philosophy that they relied on to meet challenges. Each a "personal philosophy" as a lifelong credo of meaning making such as:

Study participants seemed to possess a personal stance, a life philosophy that they relied on to meet challenges.

## Lifespan Learners: Educational Perspectives

“I’m a very optimistic person, I don’t think I have any pessimism.”

Here is how Sam, age 76, described his attitude:

If you’re a pessimist, you’re a grouch, you’re a grump. I have friends who are a pain in the butt to be with because that’s the way they are. I think life is what you make it. If you’re happy and smiling then your life will be happy and smiling. I don’t run around crying poor or crying unhappy. I don’t believe that a person makes somebody else happy. People are either happy themselves or they’re not going to be happy. You can’t make them happy. I stick with the upbeat courses at the adult ed center—film, languages, photography.

Ingrid observed,

We lived in a lot of places. The hard part was leaving all these places. But it has to be done if you’re going to get anywhere with your life. You can’t just sit in one place forever.

When asked, “Do you think you’re an optimistic person?” she answered. “Yes, I do. I think I’m a survival person.”

## Conclusion

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Educational gerontologists often attribute wisdom to the aged: surely that is an ontological bias. We hope that by the time we are elders, we will achieve the Eriksonian height of ego integrity “which conveys some world order and spiritual sense” (1968, p. 268). Yet, there is surely a rhythm to the life cycle. We seem to come into the world equipped to take on the adaptive demands of a myriad of environments. It is only logical to think that the last stages of life involve a final phase of meaning making that includes retrospection and learning. We recall C.G. Jung’s statement, “A human being would certainly not grow to be seventy or eighty years old if this longevity had no meaning for the species to which he (*sic*) belongs” (1933, p. 109).

Older adulthood brings an opportunity for human beings to explore their internal resources, find new dimensions for growth, and reexamine their histories. Among the older adult learners in this study there was a heightened sense of curiosity in personal development, autobiography, the journey of life. Integration occurs among sorrows, losses, recalling early life adventures and later life passions. The majority was flexible and resourceful in later life and, in their historical narratives, described lifelong philosophies of adaptation and the ability to recenter. They used these philosophies to process change and to achieve optimal development, relying on strengths and practiced adaptive behaviors.

Recent evidence on long-lived elders indicates that learning in old age is essential to development. Perls and Silver (1999), in a study of centenarians, found that a “stress-resisting mindset” is conducive to longevity. Brady and Sky (2003) found that older learners who wrote personal journals were able to cope better with day-to-day situations, experience joy of discovery, and nurture individual voice and spirit. Learning activities in late life were found to enhance longevity and vitality (Rowe & Kahn, 1998; Vaillant, 2002). Let us hope that research on healthy older adults continues to debunk myths of automatic senility and decline. On the contrary, narratives of survival and renewal through lifelong learning and adaptation confirm the potential of old age.

In retrospect, older learners have new lenses that illuminate life experiences and lessons. Armin Grams (2001) wrote,

This making sense of life, so inexorably bound up with what has been termed reintegration, can result, when it is successful, in wisdom. I think Samuel Johnson put this so well when he wrote: "Design on the passing world to turn thine eyes, and pause a while from learning to be wise."

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## Changing Life Options: Uncovering the Riches of the Third Age

**William A. Sadler**

### Abstract

*The longevity revolution has not only given Americans the equivalent of a 30-year life bonus, it has changed the structure of the life course. A new period emerging in the middle of life — The Third Age—provides unexpected opportunities and challenges for individuals, society, and lifelong learning programs. The author reports on significant findings from 20 years of research, using longitudinal studies, of people who have been creatively redesigning their lives in the Third Age, making it an era of fulfillment. These people have been transforming aging during their fifties, sixties, and seventies. Instead of following the decrement model of aging, their lives have moved in new directions with personal growth and renewal.*

### A New Structure in the Life Course

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The context for lifelong learning programs is changing, presenting us with both opportunities and challenges that are new in human development. A change in the structure of the life course has been emerging as a consequence of rising human life expectancy. And that rise is one of the most amazing facts in modern history. During the 20th century most developed nations experienced a longevity revolution. In the United States the average life expectancy increased from 47.3 in 1900 to 77.5 in 2000. (Treas, 1995) In personal terms this increase has meant the equivalent of a 30-year life bonus. If you've had higher education and take good care of yourself, the chance of living to 90 or even 100 is becoming a realistic possibility. For the first time in history the oldest cohorts of people have been growing faster than younger cohorts. In the United States today there are three million people over 85; in forty years there will be thirty million. Centenarians are growing even faster. In 1965 there were 3,000; at 2000 there were 70,000. The US census has forecast that by 2050 there could be over 2 million centenarians, all of whom are alive now. As my colleague Dr. Wally Bortz says in one of his books, we should DARE TO BE 100. (Bortz, 1996) We have an unprecedented gift of life—many more years to live than we ever dreamed of or prepared for.

A major question for individuals, institutions, and societies is: What will we do with these extra years? If we follow the usual decrement model of aging, the extra time

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could be spent experiencing decline, degeneration, disabilities, debilitation, disease, dependency, deterioration, and decrepitude—the dreadful D words that have defined usual aging up until now. But suppose individuals change course in midlife and insert that bonus into the middle of their lives, rather than saving it until the end. In fact we're already seeing that begin to happen, with some people experiencing vitality, growth, productivity, and greater satisfaction by delaying advanced aging with personal skills of growth and renewal. They enjoy greater longevity often without debilitating disease and disabilities. People positively changing their lives after fifty are pushing us to redefine the second half of life and aging. (Sadler, 2004)

If we use a Four Age framework to interpret the life course, we see more clearly a change in structure, with new life options.

- The First Age. A time for growing up—Preparation.
- The Second Age. A time to establish ourselves—Achievement.
- The Third Age. A time to change course—Fulfillment.
- The Fourth Age. A time for integration—Completion.

Research has already shown how the Fourth Age can be redesigned by successful aging. (Rowe and Kahn, 1998; Baltes, 1990) Until recently the Third Age has usually denoted a time of retirement. I see it differently, as an age for fulfillment. This period, from roughly 50 to 75 or 80 years, has been taking on new dimensions. As I shall show later, it often entails redefining retirement. In twenty years of research, primarily using longitudinal studies, I have discovered that the Third Age presents us with new possibilities in the life course. This discovery is of great importance to individuals, our society, and lifelong learning programs.

### Discovering Second Growth in the Third Age

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I began this research twenty years ago by interviewing about 200 people. As a student of human development, and having passed 50, I didn't like what books and the media were telling me about middle age and aging. I decided to find out if others were experiencing something different from the prevailing decrement model. I began to meet some individuals who did not fit the typical pattern of middle age decline and midlife crisis. According to the conventional model that was prominent when I began my research, the life course follows a sigmoid curve, rising to a peak followed by decline. However, the several dozen people I eventually chose to study exhibited a different pattern, moving in new directions often before they reached a peak. They were changing course to move toward new peaks—not necessarily career peaks but life peaks. I have called the new trajectory in their life course second growth, a process of renewal that transforms aging in the Third Age. What I kept asking was: How to they do it? What is the "secret" of their unexpected growth? After years of personal interviews, questioning their experiences, behaviors, and intentions, then reflecting on the process, and applying a quantitative analysis of data, I discovered that they were applying six paradoxical principles. My last book described a twelve year process of individuals, mostly in their fifties. (Sadler, 2000) In the past eight years my co-author, Jim Krefft, and I have focused on individuals in their sixties and seventies, which is the focus in our recent book. (Sadler & Krefft, to be published) As they take charge of their lives to set a new course, we keep seeing these people applying six principles of growth and renewal.

## Six Principles of Second Growth

Second Growth differs from growth in earlier stages. It is non-linear and paradoxical. It begins as people start asking probing existential questions.

1. *Reflection and Risk Taking.* All of these people have been asking questions about their lives, the directions they'd taken and expect to take: What's most important now? What do I truly value? What do I want? What kind of future can I plan for? They initiate a process similar to what Ellen Langer has called *mindfulness*. (Langer, 1989) In addition to forming new attitudes and mental frameworks, they question old scripts of aging, especially negative stereotypes they want to avoid. While becoming more mindfully reflective, they also dare to take risks; they experiment and take on new challenges. To use the phrase made popular by Professor Csikszentmihalyi, they are putting more "flow" into their lives. (Csikszentmihalyi, 1990) A motto for initiating second growth could be: "Flow to grow."

2. *Realistic Optimism.* Most of them have experienced hardships, loss, and threats to life and self-development. They do not deny obstacles in their way; they have a mature, realistic perception of their lives. But they have an optimistic attitude. They learn to build self-confidence and a positive, effective belief that they can realize their dreams.

3. *Building a Positive Third Age Identity.* The first two principles start the process, which eventually infuse this core principle and other areas of our lives. In the Second Age our identities are principally shaped by roles we play in various institutions—work, family, community. In the Third Age these people have begun to build a post-institutional identity, redefining themselves and success by focusing on a process of becoming a whole person. (Sadler, 2000, p. 79ff) There is a shift from striving for achievement towards becoming. They turn inwards to get in touch with previously ignored or pushed-aside core aspects of their personalities, such as creativity, ideals and priority values, a youthful spirit, and desire to become a fully realized person. Often they uncover new talents and interests that lead them in directions often markedly different from previous paths. Some have said they are re-inventing themselves.

El, who left his job as a senior financial officer of a Fortune 500 company at the age of 48, was motivated to make a significant change because he was discovering latent creativity and a sense of purpose. During his forties he had begun a hobby of carving and became good at it. Showing his works, he began to bring home blue ribbons. He started to realize that a different lifestyle would enable him to tap the creativity that was stifled in his corporate life. After much reflection, he concluded that "my purpose is to become the person I can be, to realize my potential, and to share." In the past 18 years, El has been putting more emphasis on sharing, because that is how he sees and values himself—as one who finds great satisfaction in giving to others, his community, and the environment.

While most aging studies have not yet focused on building a positive identity, Becca Levy and her colleagues at Yale recently reported that those who had a positive self-image in the aging process lived 7½ years longer than those who did not. (Levy, 2003) I can't claim that building a positive Third Age Identity will extend your life, but it is vitally important to your development and will surely increase the quality of your life experience.

4. *Redefining/Balancing Work and Play.* Contrary to what I expected to learn from people who were approaching retirement age, I found that work was becoming more, not less, important. But they redefine their work. Marty, a primary school teacher who

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was experiencing burnout at work in his late fifties, told me: "I have learned that my work is not my job." He eventually quit his job, but during his sixties he expanded his creative work, making stained glass and graphic designs, learning to prepare gourmet meals, and at 65 serving two years in the Peace Corps. In his seventies he has added to his work portfolio participating in Habitat for Humanity. At the same time, play was becoming more important to him. All these people illustrate the paradox of work and play—allowing more time for play and often infusing play into their new definition of work.

5. *Expanding Freedom, Deepening Intimacy.* In our fifties many of us experience a desire for an enlargement of personal freedom. Some report liberation from pressures for achievement, affluence, and recognition. Ken, a financial VP in a large university told me: "I've come to realize that the most important thing I can have now is greater freedom." Trained to be a quantitatively focused executive, he was learning late in life the values of liberating education. While expanding the scope of his freedom to become the person he aspired to be, he has chosen to use his freedom to connect more deeply with others—his wife and adult children, close friends, colleagues, people in his community, and university students. The fifth paradoxical principle of greater freedom and deeper intimacy has been apparent in most of the people whose lives I followed.

6. *Enlarging your Capacity to Care.* Like other studies, I have found an increase in the virtue of generativity, which Erikson, Vaillant and others have argued, is indispensable for healthy adaptation and growth in the middle years. (Erikson, 1963 and 1982; Vaillant, 2002) All of the people in my sample are in the process of becoming more caring. They have been increasing their capacity to care for more people, society, and earth. Paradoxically they have been learning at the same time to develop skills of self-care. This self-care has been hard for some of them, because we don't have an appropriate vocabulary to frame this virtue. Chuck, an Episcopal priest struggling to overcome his addiction to alcohol, said that the hardest thing he was learning to do was to care for himself: It sounds selfish. During his recovery he heard a voice from within saying: "You need to care for yourself!" This message was so difficult for him to enact, because he defined himself as a caretaker. Like the others, Chuck has been learning the art of creative balance, caring for himself and for others. I have seen how people in their fifties, sixties, and seventies are embracing a paradox of healthy selfcare to increase their healthspan and quality of life while they also enlarge and strengthen their care of others. Disciplined self-care can sustain people's health and youthfulness. (Schneider, 2003)

These six principles constitute a heuristically valuable strategy for enhancing personal skills in the creative process of second growth in a new Third Age.

I have been heartened to see how people put these principles into practice. Four years ago a dozen business professionals from around the country formed a new enterprise, The Center for Third Age Leadership, to apply these principles to the work force. The Center has developed programs and specific skills for individuals, organizations, and personal coaches. (Website: [www.thirdagecenter.com](http://www.thirdagecenter.com)) A colleague from the Center, Jim Krefft, and I have conducted more research and have just finished another book: *Changing Course: The Cure for a Common Retirement* (Sadler & Krefft, tpb). In addition to six principles, two key ideas about sustaining growth by creatively designing a fulfilling Third Age have emerged from this research:

- 1) Designing Third Age Careers and
- 2) Building a Third Age Life Portfolio.

These two ideas also apply to the challenge of redefining retirement, which we have seen in virtually all those we have studied.

### The Challenge of Retirement in the Longevity Revolution

Retirement as an institution is relatively new. Most people couldn't afford to retire or didn't live long enough—or both. When institutionalized in the 20th century it was seen as a fitting conclusion to a life of hard labor; this outlook was appropriate when the average life expectancy was about 65. But the concept has become out of touch with both the nature of work in the Information Age and the extension of human longevity. In their last book examining lives of people in the Fourth Age Erik and Joan Erikson concluded that retirement seemed to doom many people to a life of inertia and inactivity. (Erikson, E. and J., 1986) It also doesn't seem to promote the creative growth that we and other writers find to be possible in a new Third Age. (Cohen, 2000; Csikszentihalyi, 1996)

The people Jim and I have been interviewing have all said they do not like the idea of retirement. We didn't know that before the interviews. Carl, who left a bank vice president position in his early fifties, told us: "Retire? That's what I do when I go to bed. That's not what I want—I want to wake up, to find new ways to re-invent myself." At 65 he's into his fifth career. He left the bank because its expectations of him did not fit the emerging expectations he had of himself. He had wanted to concentrate not on increasing the bank's profits but on community service through nonprofits. After leaving the bank he developed a consulting firm; then he headed a nonprofit institution that links retired executives with aspiring entrepreneurs. Now he feels called to become a hospital chaplain, a career he has been pursuing through graduate school. His life course after 50 exemplifies what we have called Third Age Careers.

Vic, another vice president of a large corporation told us: "When I left the company after 30 years, I didn't retire. I graduated, and that meant commencing to something totally new and different." Several other people in our study have also redefined their retirement as graduation and commencement. Rebecca, a vibrant 75-year-old artist, said: "We don't use the 'R'-word in this house. What we're doing is so much more fulfilling and fun." For 17 years she has been following her passion as an artist. At 58, having raised three children and served in her husband's mail order company as a merchandising manager for over 20 years, she felt it was time to devote herself to developing what she sensed was dormant creative potential. She took art courses and proceeded to develop a variety of artistic skills in several media. Visiting her home recently was like entering an exquisite art museum.

All these people have realized that retirement as usually conceived and practiced doesn't fit the person they chose to become in the second half of their lives. Many Baby Boomers are already indicating that they share that view. As Tom, a 53-year-old TV producer put it, "We Baby Boomers don't like the terms aging or retirement. As with so many other aspects of life, we'll be redefining those, too." Since whatever we call retirement may extend 30 to 40 years, longer than our full time career, we need to prepare for this period in the life course as carefully and creatively as we did for our Second Age. Otherwise we can waste a massive amount of human resources.

All these people illustrate the paradox of work and play—allowing more time for play and often infusing play into their new definition of work.

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### Redefining Work with Third Age Careers

Until now retirement has meant not working. Even if they “take retirement” from their jobs, these pioneers have been searching for meaningful work. But it is work redefined to suit a growing self, not staying at the same job. At its best, their work is a passage to a new identity. Many have kept working for income, but not to the extent they did before 50 or 60. They have been designing Third Age Careers, often quite different from Second Age Careers, shaping their endeavors to express the person they aspire to become. Perhaps the best-known public example of such development is former President Jimmy Carter, whose careers since leaving the White House have surpassed the significance of his presidency. (Carter, 1998)

In looking at the prospects for work in the Information Age, and especially during the Third Age, the British business writer Charles Handy has reported that for the first time in history we have a chance to shape our work to suit the way we want to live instead of living to fit in with our work (Handy, 1990). To redefine work involves considerable mindful reflection. Many people are stuffed into jobs too small to allow for freedom, creativity, and growth. Even professions can become dull routines that stifle the spirit. More than half our sample left jobs. But as Ed, a professor of physical education and coach, put it, he didn’t retire from his work, he retired to a new career that involved making his hobby of raising bees into a challenging endeavor for greater meaning and profit. His new form of work contributes to his developing identity, providing a sense of meaning, purpose, and fun. Like many others, Ed has graduated from his university position and commenced a new productive lifestyle.

Woody, a former lawyer, then company president, and finally an entrepreneurial leader of an innovative inner city Outward Bound program, described his vision as one in which he strives to make an interesting life. Certainly his work was a way to make a living, especially as he and his wife raised their children. But in his fifties and sixties he felt freer to follow his deepest inclinations to build a fledgling public service company. In fact, like most others, he had been designing a portfolio of work that fits into his evolving life portfolio—

- working for pay,
- working for free (in volunteering),
- working for fun (in hobbies like photography and learning advanced computer technology),
- working with his family (especially to stay meaningfully connected with his adult daughters and grandkids), and
- learning (as in adjunct teaching, studying Chinese before visiting China, and scuba diving).

With twenty years of designing his Third Age career, Woody’s life has exemplified a creative balance of work and play, freedom and engagement, doing and becoming.

There’s no one right way to redefine work and retirement. But many people have been consciously developing Third Age Careers to suit the way they want to live. They are learning to make the important distinction between what Jim O’Toole refers to as work/work and leisure/work. (O’Toole, 2004) The former is work aimed at an extrinsic goal, whereas the latter is part of your personal development towards fulfillment. Susan, who left the corporate world and has developed a consulting business focusing on personal and organizational development, is freer in this career to express her core values. At 67 she’s still not sure she will take retirement, but “I’m trying to live and do as much



as I want now—so that my life already has those elements I’m looking forward to in retirement.” Her work portfolio includes her consulting business, volunteering with several women’s groups to promote women’s leadership development, and with environmental organizations, and as a leader in her environmentally focused living community. Learning is another important element in her life design. She entered a graduate program and aims to receive a Ph.D. in creation spirituality by the time she’s 70.

Most of these people have reduced the amount of time they invest in work. But a few have left retirement to take on new paid employment on a full time basis. Dan, an insurance executive, has re-entered the corporate world. He decided to retire at 60 but hadn’t the slightest idea what it would mean. The head of his insurance company realized the company needed his services to advise them on how to adapt to a totally different mission. So Dan took a new assignment, commuting to a different part of the country each week, and experiencing more freedom, fun, and challenge than he’s ever had. Since he was given the opportunity to design his new work, he feels much freer from pressures to do what the company expects of him, freer to do what he believes is right for it and for his own development. His plan is to incorporate the best parts of his new career into an emerging plan to redefine a later retirement.

### Designing a Third Age Life Portfolio

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For many people retirement is not a good experience. As one member in our study put it, “I tried a number of things, but I failed retirement; so I went out and got another job.” But in this failure, he learned to design a whole new way of living, not just working. All of the people Jim and I have interviewed have been creatively redefining this period for themselves. Eva, who had several successful professional careers, chose retirement at 60 only to find she didn’t know what to do with it. Unlike her physician husband, who keeps working, but with a reduced schedule, she says “my biggest task is to find my way towards another way.” Like others in our study, Eva has tapped her creative potential to design a Third Age Life Portfolio to pursue a variety of strong interests. “I have so many interests. The challenge is to give them the right amount of attention.” Eva’s new way incorporates her previous professional careers as an actor, psychotherapist, teacher, and writer in new and different formats. She also spends more time gardening, writing poetry, developing spiritually, and sharing common interests with her husband, two grown children, grandchildren, and a wide circle of good friends. Asked what retirement means to her now, she said: it signifies a period of creativity. Like other studies of creative people in the second half of life, we see the lives of people like Eva becoming more complex. (Csikszentmihalyi, 1996; Cohen, 2000) Their second growth consists of organized complexity.

Similar to building a financial portfolio, these people create a Life Portfolio by diversifying their personal investments: creativity, work, play, love, service, learning, community, selfcare, and spirituality. A Third Age Life Portfolio might have the following components:

- Redefined work—Third Age Careers for pay and for free
- Redefined play—hobbies, creative expression, leisure activities
- Family relationships—marriage, parents, children, grandchildren
- Friends—new and old; neighbors; mentees
- Service—community; politics; environment
- Selfcare—health; spirituality
- Learning—self-discovery, new information, and new application.

To redefine work involves considerable mindful reflection. Many people are stuffed into jobs too small to allow for freedom, creativity, and growth.

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Another example of a person designing a Life Portfolio is Ted, a landscape architect, who in my last book told a story of a dramatic transformation at 50. In his forties he had been in professional overdrive, working 100 hours a week. (Sadler, 2000; chapter eight) The result was that he was in danger of losing his health, his second marriage, and his happiness. Invited to go on an Outward Bound course at 48, he had a chance to engage in serious reflection and self-discovery. He realized that this life was out of whack; he resolved to reorganize around four main points. He committed to achieving balance between 1) his professional work, 2) his marriage and family, 3) community service, and 4) self-care. Interviewing him at 55, he manifested a healthy, balanced life. Ironically, his work flourished with this new commitment. He and his wife had developed a “perfect” marriage; and his relationship with his three children greatly improved. Ted also became involved in several environmental groups, particularly those focusing on his adopted state of Maine. Self-care became another priority; by 60 he declared that he was in the best physical shape since his 20s.

Interviewing him during his sixties, he reported this to be the best time of his life. Ted had no plans for retirement; he wanted his life to keep flowing as it was. But at 65, as he saw colleagues leaving the firm for full time retirement, Ted started to rethink his life course. He had previously drawn for me a design of the flow of his life, a river with many tributaries. Work was an important one; he loves what he does and saw no reason to stop doing it. But other interests claimed his attention. He amplified his four-point design with a full-fledged life portfolio.

The first and only one to do so in his firm, Ted negotiated a half-time position, so that he can continue to contribute his creative talents to the firm and provide mentoring to younger architects. He finds that he is able to do what he loves, and avoids the politics and less creative aspects of full engagement in the firm. In designing beautiful spaces, Ted’s passion also led him into several nonprofit organizations. He contributes to several institutions serving urban renewal and the environment. In addition he has started a career teaching short courses in universities around the country. At 70 he has several Third Age careers, all of which challenge and satisfy him: architect, teacher, mentor, urban planner, environmentalist, and volunteer. “This new situation actually feels like a promotion. I love what I’m doing,” he recently told me.

Play has become another important ingredient in his life. In his fifties play meant mostly sports—golf and tennis with friends, sailing and skiing with his wife. In his mid sixties Ted had a hip replacement and had to change his sport regimen. He still golfs, but he and his wife have shared a new passion, training and running sled dogs in winter through the Maine woods near their home. They still ski together, but stay off Black Diamond runs. But a big change has been his devotion to drawing and painting. He and his wife also share this interest. To celebrate their 33rd anniversary, they spent three days painting on the artistic island of Mohegan. A more flexible work schedule has allowed him more time for new forms of play. It also allows him to continue to take good care of himself: almost daily exercise, outdoor activities with his wife, and careful eating. He recently lost fifteen pounds at his doctor’s suggestion. Ted’s four-point design has been working well for twenty years.

Like most of the others in our studies, Ted has invested more of himself in his marriage and family. As a way of renewing and strengthening their marriage nearly twenty years ago, they began to plan a dream home on the coast of Maine. They bought land,



camped on it for several years to understand its distinct environment, then designed and built together this new home, which was their destination on most weekends and vacation times. When Ted reduced his work schedule at the firm, they made it their primary home. It is large enough to accommodate their growing family on weekends; three married children and spouses, and eight grandchildren often fill it. It is also a home to close friends. Nurturing relationships of family and friends has become an important part of his portfolio life. The rich design of his life is but one illustration of a new possibility for the second half of life.

## Conclusion

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My co-author and I have a metaphor for designing the second half of life with a Third Age Life Portfolio. At the base of the Rockies in Colorado runs a river the Indians named Eagle River. With its many tributaries it is shaped like an eagle's wing. The portfolios of these people resemble this river. The flow of their lives courses through new forms of growth, work, play and creativity, marriage and family, community service, friendships, spirituality, self-care, and learning. Growing older does not need to proceed downhill. Second growth can lift us to new heights. As the title of our new book suggests, we can change course in the second half of life so that our life flows in many directions simultaneously. That is how the Third Age becomes an era of fulfillment.

Marc Freedman (Freedman, 1999) once wrote that the Third Age is a season in search of a purpose. It used to be an era for retirement; through our research we have come to see it as an era for extended self-realization. Like many prominent researchers, we believe that how we age is determined not so much by our genes but by how we live. New life options are before us, which include an opportunity for second growth if we plan for it.

A crucial element in Third Age planning involves a deep commitment to lifelong learning. All of the people whose lives illustrate growth and renewal have been committed learners. They have been learning more about themselves, about opportunities and challenges, about new areas they have not previously had the time to explore, and new skills. Their learning has not been just mental stimulation with an accumulation of information. Strategic learning includes gathering information, interpreting it, and then applying learning to new behaviors. (Garvin, 2000) These people model strategic learning; they are acquiring knowledge, interpreting it, and applying it to how they work and play and live. This new view of aging offers a powerful perspective to programs for lifelong learning. Students enrolling in Osher Lifelong Learning Institutes can do much more than fill time by taking courses. They can engage in strategic learning that leads to personal growth and rejuvenation; and they can learn ways to make contributions to communities and the future. Osher Lifelong Learning Institutes can help their students take advantage of the opportunities and challenges in the Third Age by educating them about new discoveries about the second half of life, facilitating learning to redefine retirement, and providing a supportive community that encourages strategic learning and continued growth.

Similar to building a financial portfolio, these people create a Life Portfolio by diversifying their personal investments: creativity, work, play, love, service, learning, community, selfcare, and spirituality.

## Changing Life Options: Uncovering the Riches of the Third Age

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For more than 20 years, **William A. Sadler** has been conducting longitudinal studies of people who have been creatively reshaping the life course. His last book, *The Third Age: 6 Principles of Growth and Renewal after 40*, focused on people growing through their fifties. His latest book follows people who continue to grow through their sixties and seventies. Since receiving his Ph.D. from Harvard University, Bill has been teaching sociology, business, and interdisciplinary courses and has also served as dean, academic vice president, and department chair. He is currently professor of sociology and business at Holy Names University in Oakland, California. He is a founding member and director of research for The Center for Third Age Leadership.

## Pathways to a New Professionalism for Higher Education's "Old Pros"

**Anne P. Peterson**

### Abstract

*The aging of the population worldwide has caused many universities to include older learners, thus creating employment for lifelong learning administrators. This essay begins with a comparative review of national policies on adult learning, considering relationships between policy and professional self-identity, to ascertain whether a lack of government support causes operational and conceptual tensions. The author takes into account discourses of professional fulfillment and job satisfaction and discusses how staff who work with late-life learners often feel marginalized within what is perceived as a peripheral field. Given the narrow public acceptance of the social value of continuous learning, this article makes a case for the need to improve organizational climates and research capabilities in Lifelong Learning Institutes as a way of building legitimacy.*

### Introduction

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Work with mature learners in a higher education institution poses some problems for professionals' self-identities. The value and legitimacy of extending university resources to include learners age 50 and above must be considered within the context of a system of higher education (HE) which safeguards its resources for the enhancement of human capital. A growing enthusiasm for formal learning opportunities has led some in the adult education community and higher education administration to consider a re-positioning of older learners and staff working with them. In this essay I will examine the rhetoric of the social value of continuous learning, contrasting it with my lived experience of professionalism in this sector of non-compulsory, non-credit adult education. This essay allows us to consider steps toward increasing the professionalism of staff in late-in-life learning programs situated in HE. It was developed using an internationally comparative review of continuing education and professionalism literature from the UK, Canada and the U.S. The essay is also influenced by insight from my work as founding director of an Osher Lifelong Learning Institute. Both provide opportunities for reflection about which concepts of professionalism I regard as most valuable in my work setting, and to consider whether better attention to research opportunities and the discourse of social capital (Coffield, 1999) could make lifelong learning staff more highly valued and valuable.

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### Social Value of Continuous Learning

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If judged by prevailing notions celebrating the social value of continuous learning, the professional role and status of lifelong learning administrators should be exalted. It would be blasphemous today to argue that higher education ought to exclude learners based on advanced age. Rhetoric champions the notions of learning across the lifespan, student-centered learning, and learning in later life (2002). The literature (Jarvis, 2004) employs various definitions of lifelong learning, including that which I find most relevant to my professional role—Smith and Spurling's holistic notion of learning as a process and participative experience, one which comprises two parts, "an empirical element describing the scope of lifelong learning" and a moral element reflecting principles of teacher/administrator/learner conduct which respect others' learning (Smith, 1999; Glendenning, 2001). It encompasses that which I as an administrator do (facilitate institutionalized learning in later life) and that which my students become (learners engaged in an educational community). Throughout this paper I will juxtapose this definition with contrary notions of lifelong learning, such as that of the European Commission, which incorporates all learning activity undertaken throughout life, but narrowly defines its purpose, "with the aim of improving knowledge, skills and competences" in the context of the European Employment Strategy (European Commission, 2001).

Government and policy documents have for 30 years called for the transmission of lifelong learning through institutions of higher education. Universities of the Third Age, first in France, then in England and Australia encouraged older people to negotiate with local universities for the use of expertise and facilities (Glendenning, 2001). The term "Third Age" refers to the time between cessation of work and the onset of infirmity and dependence. Serving this population is sometimes seen as a noble or charitable pursuit, not something which governments can be expected to provide. U.S. public policy demonstrates the same: the Lifelong Learning Act adopted in 1976 and allocating \$40 million annually between 1977 and 1982 was permitted to lapse, and national support has since waned (Jarvis, 2004). The lack of publicly provided education for older learners has in some cases given rise to privately-funded incentives for institutions of higher education (HE). One private donor, Bernard Osher has offered grants for up to 100 U.S. universities to establish Osher Lifelong Learning Institutes (Maine, 2005b). Otherwise, support for learning in retirement is nearly always coupled with notions of economic enhancement (Great Britain Department for Education and Employment, 1998). Hence, policies such as England's plan for 'Widening Participation' exclude mature, non-vocational and non-matriculating learners. These conflicting rationales affect the self-identity of educational administrators serving the needs of older adults. In this paper I will consider how a career in administering education for mature learners has affected my professional identity, and propose steps toward a new professionalism of staff in late-in-life learning programs situated in institutions of higher education. It was developed using an internationally comparative review of continuing education and professionalism literature. Its sources are primarily from the United Kingdom, Canada and the U.S.

Admittedly, the economic return on education in late life is difficult to measure. As Gaskell (2002) asked colleagues in her talk, "What is education for in later life?" Educators' and learners' acceptance of "outcomes-led educational programmes that discipline the learners and prescribe both instrumental and affective responses expose the market as ultimately controlled by the requirements of capital and the dominant social

group” (p. 1). She notes that while the “rhetoric implies a continuum of self-development and personal enquiry, the reality exposed by funding criteria, curricula content and media coverage is that ‘lifelong’ refers to the period of life in which an individual may contribute to the economy; for ‘life’ read ‘work’ and for ‘learning’ read ‘training...’” (p. 1). This emphasis on teaching in order to benefit labor undermines the social value of continuous learning (Crick, 2005), causing those of us working in older adult administration to ask: to what extent are we a Learning Society? Do we, as administrators of HE and education policymakers, use our skills to broaden the scope of whom, within society, may learn, and how? Where institutionalized adult education does exist, I worry that the new ‘micro’-climate of social inclusion for older people is solely a response to market demand, when what is required is a change in stakeholders’ historical attitudes about who deserves to be fully educated. With more continuing education units being closed (NIACE, 2005), the milieu is unsettling for staff. A comparative study exploring professional fulfilment and satisfaction of U.S. and Canadian adult education faculties proves useful for examining the status of individuals working in this context.

### Professionalism in the Context of Mature Learners

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What we know today as lifelong learning traces its history through adult and continuing education. I found Australian Mark Tennant’s review of *Adult and Continuing Education, Volumes 1-5*, (2005) helpful in mapping its course. He describes “the adoption of lifelong learning as a replacement narrative [an alternative to the term adult and continuing education] more in keeping with contemporary social and economic concerns” (p. 527). The word ‘lifelong’ according to Barnett (2000) has become synonymous with ‘worklife’ (p. 89). Even the status of adult and continuing education as a distinct field and practice of study—and thus a profession—is also questioned. “Today, no one can plausibly describe adult education as a marginal activity, but professional adult educators have become increasingly marginal to the education of adults” (Kett, 2003) (p. 73-80). With peer-taught, workplace, informal, distance-based and other forms of adult education vying for market space, those within higher education working with older students must find credible ways of gauging our status, value, and position. The market philosophy drives the field of adult education. According to Jarvis (2004) “the government and the students are the customers, the universities the retailers and the staff are the sales assistants and they need to be proficient and efficient in their provision” (p. 312). With our authority challenged, we must reconfigure our work to adapt to conventions of the Learning Society (Barnett, 2005). To distinguish ourselves as more than sales clerks, Tennant says, requires us to become professional in our work by engaging with many of the issues that adult educators have been wrestling with in both theory and practice (2005) for decades. Some of those issues, including ideals of social justice and participative democracy, will be examined later in this essay.

I will turn now from professionalization of the individual to group identity. Researchers studying the professional fulfilment and satisfaction of U.S. and Canadian adult education and human resource development faculties, citing “overall malaise,” called for improvements in organizational climates (Peterson, 2004). They looked for discrepancies between countries and between male and female faculty. Male professors were significantly more satisfied with engaging in service to the broader community than were females. Findings included overall satisfaction with the choice of work, but working conditions and overall organizational climate were significantly less satisfying

Universities of the Third Age, first in France, then in England and Australia encouraged older people to negotiate with local universities for the use of expertise and facilities

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for those in adult education than in human resource development. One self-reflective practitioner was quoted:

"Increasingly the fire in my belly is flickering. It could be simply the passing of the years; it could be the constant requirement to justify one's educational philosophy which stands somewhat apart from the dominant education/work-preparation culture; the lack of institutional nurturance....One simply gets tired." (p. 169)

Certainly, this rings true with my own lived experience as an administrator. I've often found myself justifying the existence of a program that extends university facilities and educational resources to older learners and service to the broader community. I have detected a sense that we don't have to play by the same institutional rules as programs serving "traditional" students. When a fundraiser for our campus library complained about how hard collecting donations for the facility is, I observed that my program is also "soft-funded." He brushed off this fact, stating that it has "a soft/hard feel to it"—implying that if private funds and tuition revenue were insufficient for recovering program costs university administration would subsidize the deficit. As I discovered at a national networking meeting, Continuing Education divisions with lifelong learning programs commonly expect directors to recruit volunteers to help with clerical tasks such as stuffing envelopes and mailing newsletters. This to me is de-professionalizing, as if we were operating local charities, not credible higher education programs worthy of professional staffing.

Factors affecting satisfaction within the discipline of adult education analyzed by Peterson and Wiesenberg (2004) included prestige of the position, a collegial and a nurturing environment, and working conditions. The greatest challenge to the respondents' sense of personal fulfillment was scarcity of time. Many reiterated their dissatisfaction with administrative relationships, notably administrative intrusions, red tape, bureaucracy and trivia. Besides the hassles of administrivia other sources of discontentment included: politics; lack of innovation and systems thinking; lack of financial and moral support for research; being valued, recognized, and respected as a field; and balancing research and writing with other responsibilities (Peterson, 2004). Adult education as an academic discipline also is an increasingly feminized profession, with a rising female to male ratio. Faculty were 18% female in 1985; 38% female in 1989, and 44% female in 2003, according to Peterson and Wiesenberg. In other work dominated by women, particularly the caring professions, work-dissatisfaction often is linked with task overload because of women's desire to see the workplace run smoothly, to nurture mentees, and attend to social aspects of their job-related relationships. Researchers might look further at whether older adult continuing education faculty becoming increasingly feminized (Burke, 2004) has had an effect on professionalism (Morley, 2003) among staff.

Work in a University's division of continuing education does have many appealing elements. It is creative and community-oriented. University continuing education (UCE) has leeway to create courses, certificates, and programs without coordinating the articulation agreements necessary for credit-bearing education. Continuing education's outreach mission is attractive to those who wish to work with educationally underserved constituents: working class women, rural inhabitants, drop-outs, and businesspeople seeking intellectual stimulation outside the workaday world. In England, this is the population "Aim Higher" policies target. Yet because staff serving these learners operate in a space far from the university's core mission, there is abundant tension when one works for the other university—its extension division.



## Outsiders Looking in from the Margins

Not only is there “othering” of continuing education studies within the scheme of a university, continuing education itself places older adult education at its own periphery (Gaskell, 2001). “Institutes for Learning in Retirement often exist on the margins of UCE divisions, with the understanding that they will make little or no demand on the unit’s resources” writes Novak (2001, p. 8), who also observed that programs for older adults have rarely added much to the bottom line. I perceive that within the realm of UCE is a hierarchy of valued activity that affects the legitimacy of staff members. An employee’s merit is closely coupled with how valued her students and faculty are within the university. There is a loosely veiled, intradepartmental, pecking order which does not favor learning-in-retirement.

To illustrate this point, at the pinnacle of credibility and significance is independent study or technologically-delivered accredited courses. These allow busy young wage-earners to conveniently and economically complete degrees. Tuition for these career-development courses is often financed by employers (Novak, 2001) which keeps this activity in the institution’s high regard. In my opinion, the value of these courses is bolstered by being “directed,” if not taught, by regular faculty—not adjuncts or lecturers. The next tier down is inhabited by English language learning and professional education programs, both of which are usually taught by adjunct faculty or community experts. Preparing international students to pass the Test of English as a Foreign Language is both profitable and mission-enhancing. International students broaden the campus’ ethnic and cultural diversity. Professional education certifications in management benefit the University’s reputation among local employers and taxpayers. Skill-building courses can also spur working professionals to top-up their formal education, pursuing advanced degrees or technical certification. At the base of the UCE pyramid, and lowest in stature and resources, is lifelong learning. Within the American context this term means continuous personal enrichment. It is non-vocational and some believe, self-serving.

“International programs, distance education programs, government grants, corporate partnerships all raise the profile of the ...unit....UCE shines when it creates new partnerships and demonstrates its entrepreneurial energy. Presidents and provosts value these activities. To the extent that UCE brings new resources to the campus, the UCE unit receives praise and approval. Programs for older adults rarely bring this kind of attention” (Novak, 2001, p. 9).

This extract evidences what I have observed in divisions of continuing education by comparing the size of staff, budgets and professional development opportunities for each of these program units. A lifelong learning program for people age fifty and above does not bring a great deal of money into the university, enhance its reputation within the business community, or transform many senior citizens into matriculating students. Learning in later life is sometimes viewed as an indulgence, “an unnecessary but admirable pastime, a superfluous frill” (Gaskell, 2002, p. 1). Another continuing education administrator, (Conlan, 2005) a Widening Participation director, describes a university ethos which dismisses the value of students’ lived experiences. She maintains their voices only gain value “if they are processed, or rather ‘interpreted,’ by academics, who then claim credit for any intelligent insight” ( p. 27). But under the influence of the twin forces of marketization and managerialism (Istance, 2002) and cognizant of a progression of new managerialist techniques (Barnett, 2005) administrators who expect to attract

With peer-taught, workplace, informal, distance-based and other forms of adult education vying for market space, those within higher education working with older students must find credible ways of gauging our status, value, and position. The market philosophy drives the field of adult education.

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new or renewed funding must plan for continuous improvements and documenting programmatic outcomes. We strive for new ways to justify the existence of programs for mature learners in an age-based hierarchy which discounts both the very young and the very old, but champions the middle-aged as keepers of the keys to new knowledge (Gaskell, 2002). This can be disconcerting to our clients, whom we have enticed to return to the university with promises to acknowledge their wisdom, life experience and previous education. She states that "the older learner's experience is often discounted by the more youthful 'transmitter' who has access to new languages of description, new ways of incorporating inconsistencies into existing frameworks, and above all the ability to challenge the legitimacy of earlier knowledge bases" (p. 4). Could academic staff working with older learners be attempting to compensate for their own diminished credibility by variously borrowing from, or discounting, their students? In a higher education environment that is increasingly driven by student choice, this privileging of certain bases of knowledge by the academy hinders the new professionalism I advocate.

Managerialism is the basis for a cost-recovery model (Thompson, 2003) which is philosophically at odds with valuation of non-market or social benefits of learning—the concept of social capital. While some of our mature students are or may again become employed, we struggle against models of front-end investment that justify spending education resources solely upon dividends paid over a long period of time (Istance, 2002). We need a definition of the knowledge economy which champions a rising tide raising all boats, ancient hulls or modern vessels alike. "What we have to aim for is a competitive society, which essentially achieves a dynamic equilibrium between competitiveness and social inclusion" (O'Kane, 2002) (p. 9). We become so attuned to providing the right courses for the right reasons (including the administrators' biases about seniors' ability to retain complex information and pressure to leverage limited resources) that too often we confine our clients to a narrow range of offerings (Carlton, 1999; NIACE, 2005). Tellingly, the number of adult and continuing education departments based in higher education in the UK declined by fifty percent between 1992-2002 (O'Kane, 2002).

### Equity and Inclusion

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The push for job-related learning opportunities by government has been received negatively and cynically by some older learners, who question their perceived value in an educational system geared towards training. In response, some have argued recently that adult educators should assume, or possibly resume, a more radical position—one that doggedly advocates inclusion for the aged in institutions of higher education (Thompson, 2005). Glendenning (2001) argued 20 years ago that "justice between the age groups requires us to ensure that older people should benefit as far as they possibly can from the educational system which has been so greatly expanded through their own economic efforts." Others (Thompson, 2005) have pointed out that New Labour has appropriated the language of adult learning, turning a belief in the wider purposes of learning into a campaign for 'functional training for employment' (p. 11). Renewing a commitment to active citizenship, she advocates, could restore the energy and commitment that first gave the field of adult learning its heft. That could help breathe life into public-private partnerships for lifelong learning which may also be warranted.

Education for older people is not considered a priority—and not due to lack of demand. The promotion of lifelong learning was ranked 57th out of 73 resolutions voted upon at the 2005 White House Conference on Aging (White House Conference on



Aging Policy Committee, 2005). Social gerontologists (Glendenning, 2001) blame members of their own profession for failing to examine rationale for late-life learning, although Osher-colleague Mike Brady at the University of Southern Maine's Osher Lifelong Learning Institute has been an exception to this rule. His most recent study (Lamb and Brady, 2005) examined both processes and outcomes, noting that people derive the greatest benefits of lifelong learning in terms of intellectual stimulation, experiencing a nurturing and supportive community, enhancing self-esteem, and opportunities for spiritual renewal. One could argue that higher education's "old pros" fail to demonstrate the reflexiveness of other higher education professionals because we operate on the basis of a moral imperative. Within our souls we feel that education across the lifespan is intrinsically worthwhile and should not have to be proved. Although professionalism is imbued with a sense of internal, moral responsibility (McCulloch, 2005), modern concepts of professionalism layer further expectations upon this as a basis for operation. On top are stacked indicators of performance. Moral imperative isn't scalable.

I believe there is room for productive interaction between the academy and so-called radical strands in the wider society in bringing an end to the marginalization of lifelong learning as an educational activity (Thompson, 2005). To move it closer to the center of our universities' core missions will require more than the moral support of administrators like me, who contest the juxtaposition of social and human capital.

"The new form of radical social purpose education has therefore to attend to the kind of education that facilitates the growth of individuals capable of leading fulfilling and responsive lives and who have a reflexive grasp of what is in the best interests of themselves, their families, their communities and their society. The question of work skills will arise out of this priority rather than being subordinate to it" (O'Kane, 2002, p. 11).

We in the profession of educational administration should work to implement a systems approach, where pre- and post-compulsory education clients could aid one another in creating a more democratizing education. Perhaps this could lead us to unite the schizophrenic visions of the Knowledge Society and create a common outlook on the good society (Tennant, 2005). I find systems theory (Senge, 1990) especially useful with regard to ageism in education, because every one of us is bound to grow older. Barnett (2000) cautions universities to make more systemic, less tacit, the processes of anticipating emerging circumstances and understanding their changing constituencies (p. 135). England's "Access" courses as a means of promoting lifelong learning were also built around notions of equality and social justice. But discourses can intimidate the students such policies are intended to address (O'Kane, 2002; Burke, 2004) Others (Waller, 2005) are exploring the dangers of over-generalizing the experience of mature learners in education. These are lessons which should not be lost upon those who can influence ongoing education for mature learners. Many of us will never experience exclusion based on race, gender, ethnicity, national origin, or disability. But each of us who survives the first, second, and third age is bound to enter the fourth. And, since prior advanced education is the best indicator of continuous learning, increased access and equity for younger learners can be expected to fuel future demand for late-life learning (Thompson, 2003). We cannot afford to disregard changing circumstances and changing constituencies if we intend to accommodate older learners in the sphere of higher education.

Education for older people is not considered a priority—and not due to lack of demand.

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### Public Education, Private Funds

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One response to the lack of national policies on post-retirement education (Jarvis, 2004) has been the private funding of late-life learning at institutions of higher education. These advocate a broader, more holistic form of lifelong learning than has become the dominant form in the UK and continental Europe (Tuijnman, 2002). Philanthropists such as Hanna and Alfred Fromm, benefactors of The Fromm Institute for Lifelong Learning at the University of San Francisco (Women's International Center, 2005) and Mr. Osher, whose foundation (Maine, 2005a) has funded 73 U.S. institutes so far, have offered public universities substantial "carrots." His foundation's main focus is to support the creation of new programs or to strengthen existing programs in lifelong learning on college and university campuses. The Osher Foundation assumes that any lifelong learning program over time will attract additional funding through membership fees and donations, in-kind support from the host institution, and local corporate and foundation support. In this sense the Foundations become drivers of education policy. Other means of financing lifelong learning that have been considered include vouchers (Smith, 1999) and the partnership models in England between Further and Higher Education described, and often criticized, as Lifelong Learning Networks (Newby, 2005). Weighing financing options, the World Bank concluded that lifelong learning should be funded through vouchers and supplemented by private investments (Palacios, 2003). The World Bank's analyst concluded that private sector financing of lifelong learning improves equity and enhances social mobility by spreading learning throughout the productive life of the individual.

Without the ability here to explore opinions on how being privately funded affects the identities of staff who carry out private donors' will in public institutions, I will merely state that public/private partnerships in this educational space are a contested issue. The most revered leader in the Osher Lifelong Learning network, its national resource center executive director Kali Lightfoot observed, "To be honest the wicked little truth around here is that our professional standing has increased tangibly since we brought money into the university, but I'm not sure that we are still taken very seriously in the 'academy'" (Lightfoot, 2005). An ethos that champions elitist traditions (Barnett, 2005) is unsettled when wealthy businesspeople insert market instrumentalism. Osher requires that plus-50 learners be treated as much like traditional students as can be arranged, and that has given me leverage to acquire free access to campus recreation facilities, museums and libraries for members of our Institute. This gives additional clout to the mature learners in our program, since no other non-credit students on campus receive these kinds of benefits.

### Conceptual and Operational Tensions

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Can administrators of late-life learning programs satisfactorily resolve conceptual and operational tensions by honing their expertise and defining older adult education as part of the equality and diversity/social inclusion/widening participation reformation? This is one of the major policy agendas in UK higher education (Morley, 2003) and in depictions of an international Knowledge Society where learning is central to our economic, social and democratic life (Istance, 2002). While these policies are not often applied to learners over the age of 50, I argue that with a new professionalism among lifelong learning institute leaders, a new paradigm could transform the field of continuous learning through stu-

dent-directed learning, heightening its legitimacy and influence.

Gaskell challenges those of us in the profession to examine our roles as “empowering agents” for older learners. Within the literature on professionalism is a description of agentic action to sustain or transform both self and the workplace (Billett, 2004). As the authors note, efforts to transform practice can enable individuals to make significant changes to the conduct of their work, the requirements for performance and what constitutes effective practice (2004). Those working in lifelong learning policy and practice ought to be supremely capable of expressing identity through learning and through our language. After all, continuous personal development is our bread and butter. Through a new professionalism and our discursive practices, we should be capable of bringing our work closer to the university’s centre, transforming attitudes and altering a culture that patronizes us and our constituents with “a collective sigh of sentimental admiration” (Gaskell, 2002). Otherwise, our identities will remain frustratingly entwined with the low-status students whom we elect to serve. This is cognitively and emotionally unsettling because I believe that, as liberal institutions, universities ought to embody justice and fairness to their staff and students. It is also troublesome because post-modern learning organizations are expected to be collaborative environments imbued with core values and a moral purpose that makes us glad to give our lives (and identities) over to them (Rhodes, 2004). I empathize with the (Acker, 1999) concept of educators “doing good and feeling bad” and recognize the subjectivity of my identity within a seemingly ageist social, cultural and discursive construct (Burke, 2004). Three barriers to solving these dilemmas constrain higher education’s ability to better serve the increasing older adult market: mind-set (curriculum built on the same career development ideals featured in educational programs geared for younger learners); resources (cost-recovery for staff salaries, marketing, facilities, teaching expenses plus ‘a tithe to the central administration’ (Novak, 2001) and reward structure (at best, praise and approval for ‘lending a human face,’ (p. 9) showing the university’s ‘public-spiritedness,’ and demonstrating ‘links to the wider community’ (Barnett, 2000; Novak, 2001) .

Can the causes of most of the tensions experienced by program administrators be alleviated by emphasizing the social inclusion of older learners in higher education? To do so would require that we expand the field of study to include dimensions of well-being (Istance, 2002) and well-living in order to account for the impact of human and social capital. A promising model integrates senior studies programs within centres of lifelong learning, as the University of Strathclyde did in 1991 (Ford, 2005) with its Senior Studies Institute (SSI). The SSI supports research into later life issues and disseminates knowledge and awareness about the human resource value of the older population. Much of this work is currently coupled with the European Commission’s push for the Knowledge Society, which may or may not be compatible with the Lifelong Learning Centre’s outreach goals (University of Strathclyde, 2005). Resourceful practitioners should facilitate partnerships (European Commission, 2001) within, between, and outside of higher education necessary to build upon the theoretical foundation of this new culture-of-learning paradigm. If not, a convergence of other lifelong learning content providers (Daniel, 1996) will fill this demand.

We cannot afford to disregard changing circumstances and changing constituencies if we intend to accommodate older learners in the sphere of higher education.

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## Administrators Practicing the Art of Lifelong Learning

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New professionalism within continuing education administration might also help circumvent what one lecturer called "clumsy generalisations underpinning academic literature, the work of practitioners, and the rhetoric of policy makers" where, he observed, the experiences of mature learners were grossly over-simplified (Waller, 2005; Waller, 2005b). We should have a greater regard for our students' preferences, subjectivities, identities, and values and rely less upon our culturally and historically established practices. For instance, our Lifelong Learning Institutes offer classes in using Microsoft's PowerPoint to build persuasive presentations ('world-mastery') when 'education in the evening of life' (Novak, 2001) ought to help people explore spiritual issues, and serve self-discovery through the study of literature, art, and music, (p. 6) offering a framework for the 'discovery of meaning' (Frankl, 1990). This is a time for engagement with the world to satisfy one's own purposes, not the government's or the education system's. I have found the critiques of older student stereotyping provocative as I wonder whether private foundations would need to provide incentives for universities to incorporate lifelong learners if administrators and policymakers had a better grasp of social value. By re-conceptualizing an education system with institutions creating a consortium to provide continuous or recurrent learning experiences spanning the life course we may redefine education's purpose (O'Kane, 2002; Jarvis, 2004). An intelligently designed consortium would not be created by "top-down" bureaucrats but by inviting participants to lead the process (Billett, 2004) and shape their own learning communities. Wilson (2000) observes that "postmodernists do not separate theory from practice" ... (p. 197) but they do acknowledge how human discourse and power are inter-related. This has driven me to add to my professional, administrative role a desire to seek forums for sharing information and shaping ideologies. The activity of publicly recording information about lifelong learning programs situated in institutions of higher education is one of the only ways to transfer issues from the private world of my office to the public domain. The launching of the new academic journal, *The LLI Review*, to present original research and thoughtful commentary on issues related to learning among persons over the age of fifty (Maine, 2005b) seems to be a good way to promote gathering data in a self-critical way. This has the potential to foster organizational learning discourses and the definition of identity positions (Barnett, 2000) as part of the new professionalism (p. 109) I advocate. Cognizant of the multiple global and local frames of reference in an age of supercomplexity, academic leaders are also networking with government (White House Conference on Aging Policy Committee, 2005) agencies charged with planning for the impact of the coming "age wave" of baby boomer retirees. Barnett (2000) believes that older learners will want the university's assistance in working through the angst of living in an intellectually disturbing place, (p. 78) finding ways to bring the world under our control, or fitting it to our wider purposes (p. 39).

As part of the Knowledge Society's cross-national implementation scheme, the Bologna process, there is a push to require teaching skills accreditation standards in higher education (Istance, 2002; Jarvis, 2004). Watch closely to see whether administrators and teachers of older adult continuing education embrace or reject the concept of professional practice certification. We who work with learners age fifty and older are usually the first to reject the viewpoint that you cannot teach new tricks to old dogs. But can new tricks be taught to the 'old pros'?

## Moving Forward with a Task Fast Approaching

We have explored many impediments to integrating senior students in higher education, and it appears as though I have dwelled more upon shortcomings than administrators' capabilities. That was not intentional, but perhaps it is a condition of "doing good and feeling bad" (Acker, 1999) as I cast about for rationale for being marginalized. Publicly acknowledging the hierarchy of employee status based on continuing education students' value to the institution is one small step toward alleviating the tensions program administrators face. So, I have come to argue that to secure needed resources and justify lifelong learning will require conceptualizing older learners as socially worthy. We may do that through discussion and adoption of new definitions of lifelong learning, and through our research.

Making effective use of education resources for all learners requires thoughtfully expanding the scope of campus and community interactions (Barnett, 2000). This process should be conventional in a postmodern, learning organization sharing information up, down, and sideways to expand and create novel frames of understanding. But when it comes to incorporating older learners we too often incorporate our biases about what is tried and true (Novak, 2001). If our undergraduates are the hope of the future, our seventy-year-old overgraduates should be the litmus test of academic authenticity: a conscience energized by everything campuses have to offer. Both outputs fit our mission but the first input is at our core. Engaging with the widest range of audiences can bring about new scholarly insights. We should equate teaching retirees to acting off-Broadway: playing to a different crowd can bring a renewed focus and energy. Given the paucity of research on non-vocational, social inclusion of older learners in higher education, these possibly radical (Thompson, 2005) notions have not been so much contested as ignored. The more experience stakeholders have with the field and practice of lifelong learning, the more credible will be the lens through which this professional activity is viewed. Coupled with the demographics of aging, this makes today prime time for the continuing education community to listen, hear and respond to the needs of learners as a means of bringing a new professionalism into the university. Otherwise, older learners' loyalty and money will go elsewhere (Thompson, 2003). To assert our own as well as our students' legitimacy, lifelong learning directors must accept the responsibilities of professionally re-conceptualizing themselves and their field.

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We should have a greater regard for our students' preferences, subjectivities, identities, and values and rely less upon our culturally and historically established practices.

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# Internet Training for Older Adult Learners: An Intergenerational Mentoring Approach

**Leonard J. Shedletsky**

## Abstract

*This study, undertaken at the Osher Lifelong Learning Institute at the University of Southern Maine, tested whether an eight-week course designed to teach older adults how to use the Internet reduced computer anxiety and increased self-reported computer efficacy. Measures of computer anxiety and self-reported efficacy were taken at the start and finish of the course for both older adults and their traditional college-age mentors. The results suggest that computer anxiety was reduced in the older learner while it remained unaffected among their college-age mentors. Self-reported efficacy increased in the older adult for Internet-related computer skills but not for other computer skills and remained unchanged for the college mentors.*

## Introduction

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This research project evolved from teaching about the Internet in the college classroom. Beginning in the 1980s, the author took part in teaching an undergraduate, multidisciplinary, core curriculum course on the topic of the Internet. At the time this course was entitled “Global Computing.” It was an attempt to explore the effects of inter-network computer technology in everyday life. That course was followed by a summer course, “Internet for Educators,” offered to educators who were just beginning to think about the possibility of introducing the Internet in the K-12 classroom. “Internet for Educators,” was offered through much of the 1990’s. Through these experiences the author learned a good deal about how to introduce college students and K-12 teachers, librarians and administrators to the applications of the Internet (Amoroso, MacDonald, & Shedletsky, 1993; MacDonald, Shedletsky, & Amoroso, 1993; Shedletsky, 1997a; Shedletsky, 1997b; Shedletsky, 1995-96; Shedletsky, 1993).

It soon became clear that another group of people—older adults—could benefit substantially from this new communication technology. Older adults make up an increasingly large part of the U.S. population. Since 1900, according to the Profile of Older Americans (2004), the percentage of Americans 65+ has tripled (from 4.1% in 1900 to 12.4% in 2004), and the absolute number has increased eleven times (from 3.1 to 35.9 million). Additionally, the older population itself is getting older. In 2003, the 65-74 age group (18.3 million) was eight times larger than in 1900, but the 75-84 group



(12.9 million) was 17 times larger and the 85+ group (4.7 million) was 38.5 times larger. By the year 2030, one in every five Americans will be age 64 or older.

Increasingly, computers and the Internet have become important national and international phenomena. Millions of people would find it difficult to go through the day without checking their email, doing business, or finding information on the Internet. Increasingly, older adults are turning on computers and logging on. A 2005 research report showed that 31% of respondents over the age of 65 were online. (Emarketer.com, 2005). The PEW/Internet & American Life Project (August 5, 2005) reported that the percent of seniors who go online has jumped by 47% between 2000 and 2004. However, though growing, this report also indicated that the percentage of older persons online was low compared to other age groups.

Technology changes rapidly and it will be crucial for older adults to adapt in order to cope successfully with the changing world around them. That is, many seniors will want to use computers simply to stay socially integrated. We can imagine that individuals who are housebound can use the Internet to communicate with others effectively and efficiently, including shopping, talking with friends and relatives, participating in meetings, and other important functions.

There were many good reasons for introducing older persons to the Internet. Increasingly, the Internet became user friendly, point and click; it offered access to information and people. It offered the opportunity to shop from home and to remain a part of what was going on (Chen and Persson, 2002). Chen and Persson reported that time spent online was not the key. Instead, just “being able to learn and use the Internet seemed to make a difference between older Internet users vs. non-users” (p. 742). The research literature supported these assumptions. For instance, Chen and Persson (2002) found that “Older Internet users scored higher than non-users on personal growth and purpose in life” (p. 741). Other studies found indications of improved psychological well-being among older adults who used the Internet. White et. al. found when older adults were trained on Internet use, post-test scores indicated they felt less lonely. Wright (1999) found that older adults involved in an online community experienced less stress.

Yet we know relatively little about older Americans’ experiences with computers, their anxieties about technology, interests and goals in using the Internet, or their preferences in learning to use the Internet. According to a schema of general educational needs of older adults (Cox and Parsons, 1994), the following categories of educational needs are listed for older adults:

- Coping needs: daily tasks, health care, etc.;
- Contributing needs: the older adult being able to perform services for the community;
- Influencing needs: exerting control over the world by influencing others;
- Expressive and contemplative needs: the pure joy of learning;
- The need to transcend: transcending the physical experience and reaching a higher level of understanding;

It is striking how learning to use the Internet potentially influences each of these educational needs.

In the 1990’s the author began to offer a new, eight-week course for older adult learners entitled “Internet for Seniors.” This course was offered to adults 55 years and older through the Senior College (later named Osher Lifelong Learning Institute) at the University of Southern Maine. Classes convened in a computer lab in which each learn-

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er had a computer and demonstrations were projected to the student's monitor using a Robotel device. In its earliest incarnation I was helped by several volunteers to teach approximately twenty students. It quickly became clear that we were struggling with only a handful of helpers. In order to learn more about what worked best we began to collect data from these older learners (Shedletsky, Ouillette, & Monfort, 2001). Among key findings were the following: Older adults were taking the course on using the Internet to be a part of what was going on (also, see Eilers, 1989), to stay in touch with people, and to acquire information. They did not practice at the computer very much between class meetings. Many of them owned computers but did not know how to work them or how to connect to the Internet. They very much enjoyed having a mentor help them learn to use the Internet. The less they perceived themselves to have ability with the computer the more anxiety they had in using a computer. There were no statistical differences in self-perceived computer ability among women and men, nor was there a difference in computer anxiety between seniors taking the Internet course vs. seniors not taking the course as measured at the very beginning of the course.

Numerous studies have reported that more learners age 55 and older are acquiring computers and are getting online (Berger, 2000). At the same time, we are told that these learners bring with them a great deal of computer anxiety, that there is a scarcity of opportunities for training in Internet use, and that they do best when treated according to their unique needs. One review of the literature on computer anxiety reported that the association between computer anxiety and taking a computer course showed mixed results (Maurer, 1994), though it must be noted that these studies were not limited to older adults nor did they look at Internet use. According to Maurer's review of the literature, gender produced mixed results for computer anxiety and so did age. Some studies have compared the older to younger computer learner and found mixed results. For instance, one study reported that the younger Internet learners fared less well in psychological testing on a variable such as loneliness than did the older Internet learners.

The evidence points to the benefits for the older adult learner to be trained on Internet use. There are many apparent opportunities for this age group. Internet use offers the benefits of maintaining active social involvement, acquiring important information such as news, health, and finance information, of keeping up with the times. Morrell, Mayhorn, & Bennet (2000) found that older adults selected as their top three tasks to learn to do on the Internet: (1) to use e-mail, (2) to access information about travel, and (3) to access health-related information. They also found that the main reason why older adults were not using the World Wide Web was that they simply did not know how to do so. Having worked with the older adult learner, it seemed clear that an important component of the process was the learner's attitudes toward the Internet. Further, we were concerned about anxiety among older computer users.

It makes sense that computer anxiety would be associated with avoiding computers. Scott and Rockwell (1997), testing young adults (average age of 22 years), found a negative correlation between computer anxiety and future use of computers. Moreover, they found that past experience was also a predictor of future use. If this finding holds true with older learners, then it becomes important to provide good experiences with technology.

Importantly, Czaja and Sharit (1998), testing older (60-75) and younger adults (20-39) on their attitudes toward computers, found that the quality of the computer experience (e.g., extent of computer experience, the frequency and breadth of use) had an effect on attitude change. Czaja and Sharit's study looked at attitudes toward com-

puters with respect to three tasks: data entry, database inquiry, and accounts balancing. Their results indicated that gender, task and age group did matter in producing attitudes toward computers. Also, they found that the older adults perceived themselves as having less efficacy (feelings of competence with the computer), and control over computers than the younger adults. Cody et. al. (1999) found that the older adults who dropped out of their four-month long Internet training program (average age 80.4 years) had higher levels of computer anxiety than those who stayed in. The drop outs also had lower levels of perceived computer efficacy. Those who stayed in the Cody et al. study were more likely than the drop outs to express increased perceived social support and connectivity and reduced computer anxiety. Morris (1994) offered an introductory computer course to older adults (average age 67.4) and found that attitudes towards the computer generally improved after taking the three-session course. In the Morris study, the computer course was not about the Internet. In fact, few studies report on computer anxiety and the Internet for older adults (See Cody et. al., 1999).

Cody et al. suggested some things to do in building an Internet training course for older adults. They wrote, "To be successful, we believe programs should focus on reducing anxiety and building efficacy (and to do so early) and feature lessons phrased optimistically and in encouraging formats" (p. 281). Based on the research literature (Brett and Bayen, 1998) and the author's own experience teaching Internet use to older adults, the "Internet for Seniors" course was structured with specific older adult learning needs in mind. To begin with, the following lines appear in the course description:

"This course is a low-anxiety introduction to using the Internet. It is a non-technical approach for novice users—no prior computer experience is needed. You will be introduced to the major ways in which people communicate over the Internet." (Internet for Seniors, available at: <http://www.usm.maine.edu/com/seniorcol/sencoll.htm>)

The course was structured to take the following adult learner needs into account:

1. The need to ask many questions and to get a quick response;
2. The need for self-pacing;
3. The need for memory helpers, like handouts and notes;
4. The need to take in information slowly and to go back over information;

The idea of providing one-on-one mentors (undergraduates) for the adult learners seemed to address these needs. Additionally, having one-on-one mentors meant having someone available for questions, help with note taking, assistance with reviewing demonstrations, and facilitate self-pacing. At the same time, it promised to offer a valuable intergenerational experience for all. It quickly became apparent that the older student was not just a learner and the younger mentor was not just a teacher. The roles moved back and forth very smoothly, and mutual respect and friendship flourished (McGowan and Blankenship, 1994). The journals kept by the undergraduate mentors would attest to this, but this is another article for another time.

This article reports on the effects of the Internet for Seniors course on computer anxiety and self-reported efficacy of the seniors in comparison with traditional college age adults. The questions that this study sought to answer were whether or not the older adult participants in the course would show a reduced level of computer anxiety and an increased level of efficacy in computer use.

Internet use offers the benefits of maintaining active social involvement, acquiring important information such as news, health, and finance information, of keeping up with the times.

## Internet Training for Older Adult Learners: An Intergenerational Mentoring Approach

### Method

#### Subjects

Data for this study were collected from participants in the OLLI (Senior College) Internet for Seniors course (N = 44) and the undergraduate Intergenerational Communication and the Internet course (N = 36), during the years 2001, 2002, and 2003. The average age of the seniors was 73.1 years. The undergraduates were traditional college age, approximately 21 years old, with the exception of several non-traditional age undergraduates. Subjects were made up of a convenience sample of people who signed up for the Internet for Seniors class (OLLI) and undergraduate students who signed up for the Junior level undergraduate elective course (Intergenerational Communication and the Internet, as part of the major in communication) at The University of Southern Maine. Both courses were limited to 15 students each but depending on enrollments and drops, the total varied from year to year. In 2001, there were 12 undergraduates and 17 seniors; in 2002, there were 15 undergraduates and 15 seniors, and in 2003, there were 12 undergraduates and 12 seniors.

#### Procedure

Both Senior College and undergraduate students were asked to fill out two questionnaires on the first day of the Internet for Seniors class measuring (1) computer anxiety and (2) computer ability, also referred to as efficacy. The computer anxiety questionnaire was taken from Heinszen, Glass, & Knight's Computer Anxiety Rating Scale (1987), a nineteen-item questionnaire requiring subjects to select from "Strongly Disagree - Strongly Agree" on a scale from one to five. Sample questions include: "I look forward to using a computer," and "I feel apprehensive about using computers." The teachers computer ability profile (Thurlow, 1999) asked about basic computer skills, managing computer files, using word processing software, use of other software, use of multimedia CD-ROM and educational software, and use of the Internet. Respondents selected a level from 1 to 5 for each area. An online copy of the ability questionnaire is available at: [http://www.johnthurlow.com/usm/emt/handout\\_08.pdf](http://www.johnthurlow.com/usm/emt/handout_08.pdf). This survey was again completed at the end of the course, seven weeks later. In addition, seniors filled out a questionnaire that asked about their experience with the mentoring system. (For instance, they were asked, "How much or little has the mentoring system we used in this class helped you?" Participants chose from one to ten, extremely little to extremely much. Another two questions asked: "What did you like most about the mentor system in this class?" And, "What did you like least about the mentor system in this class?").

#### Results

This study was designed as a quasi-experimental factorial design, with four independent variables, Age (undergraduates and older adults), Gender (male and female), Semester (Fall, 2001, Fall, 2002, Fall, 2003) and Time in Semester (pre-test and post-test). The two dependent variables were Computer Anxiety and Computer Ability. The study attempted to answer two key questions:

1. Whether or not the older adult participants in the course, "Internet for Seniors," would show a reduced level of computer anxiety after their experience in the Internet for Seniors course;
2. Whether or not the older adult participants would show an increased level of efficacy in computer use after taking the course;

We found that for the three years, 2001, 2002, and 2003 combined, older adults (N= 42) scored significantly higher on computer anxiety than the younger adults (N= 30) at the start of the course (Figure 1), ( $F=22.307$ ,  $df=1$ ,  $69$ ,  $p<.0001$ ).

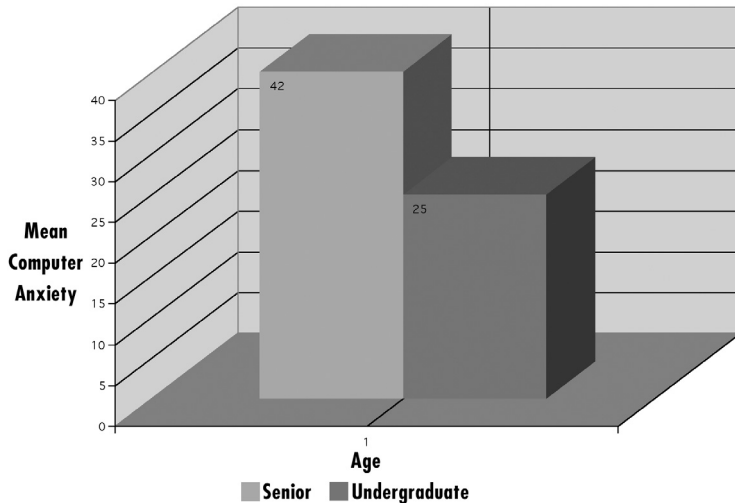


Figure 1. Over the three years, 2001-2003, older adults showed a higher amount of computer anxiety at the beginning of the course than young adults.

No difference in computer anxiety was found for gender ( $F=.564$ ,  $df=1$ ,  $69$ ,  $p>.05$ ) at the start of the course, or at the end of the semester ( $F=1.630$ ,  $df=1$ ,  $60$ ,  $p>.05$ ). No difference in computer anxiety was found for semester at the start of the course ( $F=.627$ ,  $df=2$ ,  $69$ ,  $p>.05$ ), however by the end of the course there was an effect for semester ( $F=4.134$ ,  $df=2$ ,  $60$ ,  $p<.05$ ). No interactions were found for age, gender and semester with regard to computer anxiety at the beginning of the course.

By the end of the Internet for Seniors course, age was unrelated to computer anxiety ( $F=1.379$ ,  $df=1$ ,  $60$ ,  $p>.05$ ).

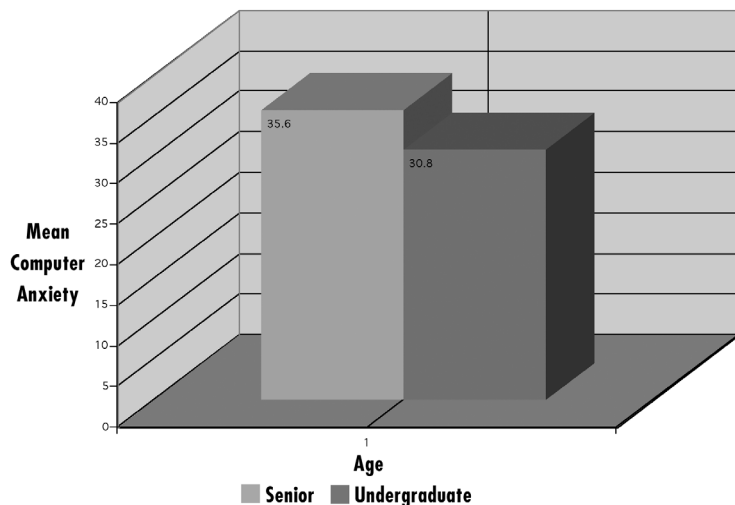


Figure 2. By the end of the Internet for Seniors course, over the three year period tested, there was no difference shown for computer anxiety due to age (seniors Mean = 35.6; undergraduate Mean = 30.8).

...having one-on-one mentors meant having someone available for questions, help with note taking, assistance with reviewing demonstrations, and facilitate self-pacing.

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We found that undergraduates scored higher on computer efficacy (ability to use the computer) than seniors both at the start and at the end of the course (for all three years combined, at the start of the course, seniors Mean = 1.6 vs. undergraduate Mean = 3.7; at the end of the course, seniors Mean = 1.7 vs. undergraduate Mean = 4.04). Analysis of variance with age and semester as independent variables and computer ability as the dependent measure, showed that at the start of the course, age produced a main effect ( $F = 85.775$ ,  $df = 1, 66$   $p < .0001$ ); by the end of the course, age still showed a main effect for computer ability between older and younger participants ( $F = 108.044$ ,  $df = 1, 66$   $p < .0001$ ). There were no other main effects or interactions for computer ability.

Surprisingly, participation in the course had no impact on computer efficacy ( $T = .684$ ,  $df = 41$ ,  $p > .05$ , two-tailed). However, when the computer ability data for USE OF THE INTERNET only were tested with a paired samples test - as opposed to a wide range of computer abilities, including use of other software, word processing, multimedia, file management and educational software -, a different picture emerged. The OLLI students ( $N = 43$  for the pre-test;  $N = 36$  on post-test) showed an increase in self-reported ability on Internet Use ( $T = 3.944$ ,  $df = 32$ ,  $p < .0001$ , two-tailed). The mean score on Internet Ability increased from 2.0 before the course to 2.9 after the course.

When the computer ability data for USE OF THE INTERNET only were tested with a paired samples test for the undergraduates, no statistically significant difference was found between the pre-test and post-test means ( $M = 4.3$  pre vs.  $4.2$  post). The paired samples T-Test produced no effect ( $T = .297$ ,  $df = 27$ ,  $P > .05$ , two-tailed).

At the end of the Internet training course, the older adults were asked to fill out a questionnaire about the mentoring system. The only numeric question asked was as follows: "How much or little has the mentoring system we used in this class helped you? Please indicate by choosing from 1 to 10 below, where 1 = extremely little help and 10 = extremely much help." In 2001, mean response was 9.1; in 2002, the mean response was 9.7; and in 2003 the mean response was 8.8. The qualitative responses strongly reinforced the very positive numeric response, with comments like: "Very pleased with this system;" "Makes learning more fun and certainly helps greatly;" "This is a great learning methodology;" "They are a great help;" "It gives me a feeling of more confidence because the mentor is a person I don't have to fear. The mentor is on my side;" and "The mentor has been extremely helpful."

### Discussion

The study attempted to answer two key questions:

1. Whether or not the older adult participants in the course, "Internet for Seniors," would show a reduced level of computer anxiety after their experience in the Internet for Seniors course;
2. Whether or not the older adult participants would show an increased level of efficacy in computer use after taking the course;

We found that after experience in the course, the older adult learners produced a significantly lower level of computer anxiety and that after experience in the course, the older adult learners produced a significantly higher level of self-reported computer efficacy or ability. Both findings appear to be consistent with earlier research. Just as with the earlier study (Shedletsky, Ouillet, & Monfort, 2001), gender did not produce an effect on anxiety with the replications reported here. In the current study, when we looked at efficacy across a range of computer skills, we found that the older adults



reported less efficacy than the younger adults, much like Czaj and Sharit (1998). Looking at Internet training and use, Cody et al. (1999) found that older adults who stayed in their course reduced their computer anxiety and increased reported efficacy compared to those who dropped out. While we do not have many other studies to compare with on Internet training for older adults, what we do have is consistent with our results. It appears that training in Internet use for older adults can produce reduced computer anxiety and increased self-reported efficacy.

While this study cannot specify exactly which variables contributed to the decreased computer anxiety and the increased self-report of efficacy among the older adult learners, the research literature points to several key factors. In Eilers (1989) study of older adults learning to use the computer for programming, she pointed to components of a successful computer course for older adults, as follows:

Ample explanatory lectures with plenty of review; adequate, supervised practice time in the computer lab; 'friendly' self-instructing, self-paced lessons which allow the learner to deal with errors privately; continuing exchange of new technological concepts and advances; instruction and assistance by age-peers who are supportive, empathetic and patient; informal, noncompetitive "fun" ambience and camaraderie; relevant courses, applicable to the lives of elders; and a comfortable physical environment, including wheelchair access, adequate lighting, book racks, and large print manuals and display screens (p. 72).

Eilers suggestions read like a manual that we followed in our Internet for Seniors course, except that we used younger adult mentors one-on-one and we worked on Internet use rather than programming. Our objectives were simple, aimed at the beginner and non-technical. Plenty of time was allowed for socializing, as much as the learners wanted.

Finally, we might try to account for some of our findings. Of course, we can speculate on the why's. The literature suggests that having a positive computer experience is critical in reducing computer anxiety and predicting future use (Morris, 1994). This course did everything it could to provide a positive experience, beginning on day one with the senior simply meeting the mentor and playing solitaire on the computer. Each learner moved at their pace and went off on tangents with their mentor. The course was devoted to the main Internet topics that seniors are interested in: e-mail and surfing for information and genealogy. The instructor presented himself as a computer user and not a technically advanced computer expert. He emphasized not using jargon and not needing to be an expert to "drive this machine." He drew simple pictures on the board to explain what a computer network is or what uploading and downloading mean. Humor was no stranger to the classroom. The undergraduates and older learners formed friendship relationships and related more as grandchild-grandparent than as teacher student. Mutual respect and gratitude were quite evident. McGowan and Blankenship (1994) reported similar dynamics in an intergenerational project, where undergraduates developed new ideas about what it means to be an elder and new ideas about how to relate to an elder.

As for the change in computer anxiety among seniors but not the undergraduates, it would seem that the seniors entered the course with computer anxiety and had room to reduce that anxiety. The undergraduates were already confident users of the computer, especially if they chose to stay in this course. Similarly, with computer efficacy, the seniors had room to grow their sense of efficacy, but the undergraduates were already

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confident Internet users at the start of the course. The undergraduates learned about “being an elder” and talking to an elder, but gained relatively little knowledge about the computer from the course. The seniors, on the other hand, came out of the course feeling like they had learned some information about using the Internet. And as a side note, many told me that they also learned about “being a college student.” Interestingly, and not surprisingly, computer efficacy applied specifically to Internet use and not to general computer ability.

As a final note, it would appear that an eight-week long course devoted to the older adult learner, with undergraduate mentors, can and does succeed. Attending to the needs of the learner was central, in terms of cognitive processing, social behavior, and emotional well-being.

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## Cognitive Benefits of Participation in Lifelong Learning Institutes

**Patricia Simone and Melinda Sculli**

### Abstract

*This essay examines the role of cognitive stimulation in maintaining high cognitive functioning in later life. Cognition is dependent upon brain function and brain function can be improved through physical exercise and cognitive stimulation. Lifelong learning institutes offer older adults a myriad of opportunities to enhance their cognitive function. These institutes are not unique to the United States and need not offer courses in any particular format in order to facilitate cognitive benefits.*

### Introduction

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**T**he fountain of youth eluded Ponce De Leon. Even so, Americans born today can expect to live nearly 30 years longer than Americans born a century ago (National Center for Health Statistics, 2005). The current challenge is not adding years to our lives, but keeping the life in our years. In other words, we are not satisfied to merely live long. Our goal is to live long well. What can we do to age successfully?

Rowe and Kahn (1988), in their groundbreaking investigation into positive aging, suggest three keys to successful aging: (1) maintain high cognitive and physical functioning, (2) stay engaged with life, and (3) avoid disease. This article will emphasize ways in which involvement in university-sponsored lifelong learning institutes promote successful aging through improved cognitive functioning.

Cognitive functioning includes our ability to think, reason, and judge. Many scientists study cognition (e.g., cognitive psychology, cognitive neuroscience, neuropsychology), often examining topics such as attention, memory, and intelligence. While not everyone is familiar with the scientific definition of cognition, most people fear the loss or decline of cognitive ability. Specifically, Alzheimer's disease, which is primarily a disorder of cognition, is a leading concern of older adults. Therefore, there is a great interest in finding ways to maintain or improve cognition in later life.

Cognitive functioning is dependent on several factors. First, cognition depends on the health and fitness of the brain. Brain fitness can be improved by cognitive and physical stimulation. Mental health and social factors also have an impact on cognition (e.g., depression). While many people assume that we have very little control over our cogni-

tive functioning, lifestyle choices can significantly affect cognition in later life. Some relatively simple changes to our lifestyle can dramatically improve our opportunity for aging successfully.

## Cognition and the Brain

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Our ability to think depends on brain function. Unfortunately, the brain suffers damaging consequences of aging, including loss of brain weight through neuronal loss and the accumulation of plaques and tangles. The hippocampus, a part of the brain essential for learning and memory (e.g., Numan, 2000), is especially targeted in the aging process. Changes in the hippocampus are correlated with the decline in the ability to learn new tasks (e.g., Gage et al., 1984).

Brain health and fitness are major concerns in aging. Can anything be done to reduce the deleterious consequences of aging on the hippocampus? Fortunately, the answer is “yes.” Both physical exercise and cognitive stimulation appear to be able to reduce, if not reverse, the negative effects of aging on the brain.

## Aerobic Exercise

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In a recent study, van Praag et al. (2005) examined learning ability in mice. Aged mice allowed to exercise on a running wheel were faster to learn a memory task (Morris water maze) and they maintained the memory longer than age-matched control mice. These researchers found that the aged-mice who exercised showed similar development of new neurons in the hippocampus as young mice. They concluded that voluntary exercise can reduce deficits in learning and loss of neurons that are commonly associated with aging (van Praag et al., 2005).

Fortunately for humans, the beneficial effects of exercise on cognition is not limited to mice. For example, one study found that older adults (65+) who exercised throughout life lost less brain tissue than non-physically fit aged adults (Colcombe et al., 2003). Another study found that aerobic fitness in later life improved performance on cognitive tests (e.g., Kramer et al., 1999). Sedentary people lose brain tissue faster than active people, with likely cognitive consequences. While exercise is one way to improve cognitive function, fortunately for many, it is not the only way.

## “Use it or Lose it”

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Learning can improve cognition and cause physical changes in the brain. Early work of Marian Diamond and colleagues found that mice living in an “enriched” environment consisting of more cage space, a running wheel, and a tunnel developed heavier brains, increased thickness in certain brain structures, more connections between nerves including increased branching of neuronal projections, and differences in the levels of some neurotransmitters. Significantly, these mice were more successful than the control group on learning tasks like maze navigation. These results implied that the brain function improvement was a result of the environmental changes (Rosenzweig et al., 1972).

Alvarez-Borda and Nottebohm (2002) studied the ability of the canary brain to adapt and grow new brain cells in order to learn new songs each year. Birds that utilized their new brain cells by singing retained those cells longer. Birds whose songs were interrupted by an outside event produced less of a chemical that advanced cell growth and

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survival. In this study, birds that engaged in learning new songs and were able to interact with the world increased benefits to their own brain functioning.

Research with animals has shown that how they spend their days (enriched environments, in song) has an impact on their cognitive ability. Again, this effect of learning on cognition and the brain extends to humans. The Seattle Longitudinal Study is considered to be one of the most extensive psychological research studies of how people develop and change through adulthood. This study followed 500 Group Health members from 1956 to 1998 in seven year intervals. Participants were evaluated on a number of levels to account for age related change, especially cognitive decline. Results showed that variables important to reduce cognitive decline include involvement in a complex and intellectually stimulating environment and maintenance of high levels of perceptual processing speed, among others. Conversely, limited cognitive engagement can result in increased cognitive decline (Schaie, 1997). They suggest that the cognitive decline observed in many community-dwelling older adults may be reversed by increasing cognitive stimulation.

Another study involved a longitudinal examination of nuns and priests followed since 1993. Members of this population that engaged their minds for a “significant” amount of time in any of seven information processing activities (including reading the newspaper, going to museums, and playing puzzle games) had a 47% less chance of developing Alzheimer’s Disease than did people who did not challenge their minds in this way (Wilson et al., 2002). Some speculation considers that mentally stimulating activities protect the brain in some way and perhaps the more adaptable and nimble the mind, the more it can compensate for the declines in other areas (Wilson et al., 2002). Cognitive stimulation is essential. Additionally, in the Nun Study, Snowden and colleagues provide evidence that mental decline is not inevitable and, in fact, indicate that lifelong learning may even prevent or delay the symptoms of dementia and Alzheimer’s Disease (e.g., Snowden, 2001).

Other studies demonstrate that how we spend our days also has an impact on our cognitive abilities. In particular, compared to the general population, college professors perform significantly better on cognitive tasks (Shimamura et al., 1995). Can professorial responsibilities improve cognitive function? Professors are in an environment in which life long learning is encouraged. They learn in the classes they teach and the research in which they engage. They are surrounded by intellectually stimulating events including scholarly talks, museum exhibits, theatrical and musical performances. Their jobs provide continuous mental stimulation, and this stimulation has a positive impact on their cognition (and likely on their hippocampi too). University campuses offer excellent opportunities to provide the challenges, the enriched environment, which promotes improved cognition and successful aging. The benefits are not restricted to college professors.

Many universities now invite older community members to benefit from the rich learning environment available at college campuses. The many benefits of lifelong learning can be delivered to the older adult population through a variety of formats. The course format, which can be offered both with and without credit, is similar in content and structure to traditional university classes, and includes lecture, discussions, and workshops, which may be conducted by university faculty, staff, or led by peers. Regardless of format, the key is cognitive stimulation and engagement. Obviously, the more engaged the learner, the greater the benefits.

## University Lifelong Learning: A Brief History

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Nations around the world have identified lifelong learning as an important matter of public policy. Both public and private organizations in a variety of formats attempt to address the educational needs and wants of older adults.

U3A, L'Universite du Troisieme Age or University of the Third Age, was founded in Toulouse, France in 1972 where universities began to provide educational opportunities for older adults. The experiment met with almost immediate success and soon spread to other European countries. Every member of the educational group is encouraged to contribute voluntarily to the running of their U3A organization in some way. U3A currently has millions of members. The French model of U3A consists of courses, lectures, and workshops taught by regular or adjunct university faculty (Yenerall, 2003). The success of the U3A is well-documented. For example, one study concluded that members of the U3A had better than average general, physical and mental health, and that membership contributes to the positive perception of well-being (Mitchell et al., 1997).

Lifelong learning has been widely and popularly accepted in Great Britain as well. The U3A made their way to Great Britain by 1981, but it was adapted and instead of being dependent on universities, as was the 'French' model, it became a movement based on self-help and mutual aid, a kind of "intellectual democracy" (Yenerall, 2003). This became known as the "Cambridge" or "British" model. The program still shares the common concept of encouraging older adults to remain active in their retirement and continue lifelong learning. However, in the Cambridge version a participant can be a course leader one day, then a student the next. Such peer led discussion groups have an expectation of reciprocity (Brady et al., 2003). For example, peers both plan and facilitate the courses, and learn from the teaching experience also. With the breadth and depth of the knowledge of the group, teachers and students are constantly changing roles (Brady et al., 2003).

Finland's educators also joined the U3A movement in the 1980's. Finland's lifelong learning programs do not have an age requirement and the number one reason for joining is to learn more, as compared to the more social seekers of other countries (e.g., United States). Finland's lifelong learning format is more a hybrid model of both France and Great Britain's format of facilitation (Yenerall, 2003). U3A institutions are affiliated with universities, as in France, but rely on peer groups to guide the content and course structure, much like in Britain. One interesting format that the people in Finland have added is Research Seminars. The two main programs of these seminars are actual research carried out by U3A members themselves or research on U3A students. Recently, a movement has begun to petition to offer college credit to count towards a degree for courses taken (Yenerall, 2003).

An initiative in Spain was undertaken in 1993 to open universities to seniors without creating separate centers, which they had done previously (Orte Socias et al., 2004). These officially recognized programs and courses are offered by various private and public universities in Spain and dubbed "University of Programmes for Seniors." The average duration of program length is three or more years and primarily is concentrated in the social, medical and technological sciences. The focus has been on the integration of the older population into the university through specific educational offerings. Other objectives include developing positive attitudes to aging through activities and participation, providing a framework for intergenerational relations, and improving the quality of life for older adults. In fact, the university programs promote intergenerational

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activities to encourage contacts between senior students and the traditional students (Orte Socias et al., 2004).

Approximately 25,000 students have enrolled in these programs since their inception, and demand is very high. In the 2001-2002 academic year, the approximate number of students enrolled was 14,000. Since the programs do not have the same entrance prerequisites, the range of cultural and social dynamics vary. Females make up the majority of students, with a highest median age of 55-60 years old. Some 50 private and public Spanish universities now offer education specifically for seniors and it is expected that programs of this type will become more and more generalized into the 21st century (Orte Socias et al., 2004).

Lifelong learning in Japan is affected by cultural and social factors. Universities and colleges have rigid admission standards and only a small fraction of their students are above even traditional college age. Older learners can be served by the University of the Air, a TV and Radio based school in the Tokyo area, but these programs do not capitalize on the social and community benefits of lifelong learning (Iwanaga, 1992). The government does sponsor programs through the Ministry of Education, Science, Sports, and Culture, and these programs are available in most major cities to people who seek them out. However, the culture does not expressly encourage older members of society to seek these opportunities, and the government is attempting to change this societal view through promotional and educational programs (Wilson, 2001).

Lifelong Learning Institutes have many different names across the United States and Canada. There are over 400 unique organizations established at institutions of higher learning, both large and small, private and public organizations that offer lifelong learning to older adults. The first lifelong learning institute was named the Institute for Retired Professional (IRP) and it was established in 1962. Many colleges and universities replicated or adapted the IRP model ("A Brief Overview," 2005). During the 1980s, the discussion about lifelong learning increased dramatically. Several national conferences introduced the American form of lifelong learning to other nations and spurred the development of many lifelong learning institutes ("A Brief Overview," 2005).

No single "model" for Lifelong Learning Institutes (LLI) exists in the United States. Each LLI is sponsored by individual universities and are based on the goals and mission of the host university and the individual needs of each community. LLI's have been described as school without grades or tests, where the only prerequisites are an active mind and a desire to learn in a friendly and supportive atmosphere. These communities of learners design their own college-level curriculum according to their needs and interests, and their common bonds are intellectual curiosity and the experience of their generation. Lifelong learning institutes offer opportunities for local adults to be involved in ongoing academic programs geared to their interests. A commitment to learning is consistent among the many thousands of energetic and enthusiastic LLI members ("A Brief Overview," 2005).

An interesting new trend in lifelong learning and living in the United States is the "back-to-campus" movement. There are over 50 retirement living communities linked to colleges such as Stanford University, Notre Dame, the University of Michigan, Penn State University, Ithaca and Oberlin Colleges and the University of Florida. At Lasell College in Massachusetts, for example, there is a waiting list to move into the residence and the program requires its 200 residents to complete 450 hours of learning and fitness activities a year ("Campus Dream," 2005). "There is a mentality about the future



here rather than the past,” says Paula Panchuck, the dean of Lasell Village. “Instead of, ‘My life is over,’ it’s, ‘What classes are coming up in the spring?’” As the baby boomer generation ages, they will continue to actively seek out creative and innovative lifelong learning opportunities to integrate with their life (“Campus Dream”, 2005). This is an interesting way to encourage the older adults of our society to maximize the many benefits of lifelong learning.

### Lifelong Learning Institutes: Cognitive Benefits

Lifelong learning has a positive and lasting impact on cognition. As can be seen from the international approaches to lifelong learning, the format or structure of the learning process can be flexible and learning can occur in a variety of formats, not just in a college classroom.

While everyday activities stimulate the brain and lead to cognitive benefits (e.g., Wilson et al., 2002), active learning is a complex process and can be considered an ideal means of cognitive stimulation. This learning does not have to be at the level of an advanced physics class at a university. It can simply be learning something new and stimulating, such as gardening or being involved in a group discussion on a current topic. However, in addition to direct cognitive stimulation through courses, there are other benefits to being a member of a lifelong learning institute.

A focus group study conducted by Lamb and Brady (2005) found members of an Osher lifelong learning institute to be highly energized by the “joy of learning.” This study also reported a dramatic increase in the self-esteem of the participants, as participants rejected the traditional stereotypes about aging and exhibited tremendous pride in their own accomplishments. Other anecdotal evidence is apparent in Cusack’s (1994) study on empowering seniors as leaders in a lifelong learning program in Vancouver, British Columbia. A participant responded that, “Education and learning keep me from getting depressed.” Another stated, “Just because your body begins to fail, doesn’t mean you lose interest in life and stop learning. In fact, study and mental growth can make the onset of illness more bearable.” Participants indicated a perceived increase in their ability to express their ideas clearly, the feeling that they have been heard, and an increase in self-esteem (Cusack, 1994). Lifelong learning provides older adults with the skills and confidence they need to participate effectively in decision-making processes, increasing their self-efficacy.

This form of self-esteem leads to improved performance in solving not only cognitive problems, but daily life challenges. Learning a new language, developing an understanding of different religions, and mastering new technologies provide examples of challenging problems that are useful in enhancing the belief in one’s ability to handle new tasks—the “Can-do Factor” (Mehrotra, 2003). For example, women who have traditionally filled the primary caretaker role in the home, find that lifelong learning provides them with opportunity to experience intellectual confidence that contributes to their self-esteem (Lamb & Brady, 2005). Both men and women reported feeling smarter and more intellectually competent.

This confidence contributes to a more positive attitude. Many lifelong learning educators have witnessed the transformation of learners, as people become visibly stronger, more vital and alive (Cusack et al., 2003). More evidence points to learning as a case for health promotion. Results of a survey in the UK of participants aged 40-60, reported the direct benefits of learning as reduced stress, reduced depression, feeling

The success of the U3A is well-documented. For example, one study concluded that members of the U3A had better than average general, physical and mental health, and that membership contributes to the positive perception of well-being (Mitchell et al., 1997).

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more positive, achieving goals, and more energy. (Cusack et al., 2003)

Social interactions are important for successful aging, yet many older adults find themselves alone. Isolation can contribute to feelings of depression. Relationships involve supportive behavior and the experiences of being supported have positive effects on physical and mental health (Mehrotra, 2003.) Support can help one obtain better or more prompt medical care, promote healthy group norms, and increase one's resistance to disease.

Social connection is identified in the U.S. as an important reason to participate in lifelong learning institutes. Learners have expressed passion for the myriad ways that lifelong learning has enriched their lives socially. They describe the experience as a safe and nurturing community where they could take intellectual and emotional risks (Lamb & Brady, 2005). Close interactions and relationships with other people are essential to our well being. These relationships involve supportive behavior, and the experiences of being supported have positive effects on health (Mehrotra, 2003.) The social network developed during the learning experience acts as a protective factor from many of the damaging effects of stressful life events. The social benefits of lifelong learning help to solidify and enhance the mental health benefits. Learners increase their self-esteem and self-efficacy in a highly supportive social environment.

## Conclusion

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The environment in a university setting fosters successful aging for members of lifelong learning institutes by encouraging high cognitive functioning through a variety of intellectually challenging opportunities. These opportunities in turn encourage interactions with others and promote engagement with life. Therefore, those who participate in campus events improve their likelihood of aging successfully.

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## Training Retired Social Workers: Experience and Innovation to Serve the Aging Population

**Kelly Mills-Dick**

### Introduction

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It is no secret that the population is aging. Every paper and presentation related to gerontology cites not only the increase in the aging population, but the relevant deficiencies in services to meet the needs of this population. Social work, a profession attuned to the physical, mental and social needs of its clients, will be at the forefront of service provision to older adults. Social work is distinct among health care and service professions because its practitioners are trained to consider the entire range of physical, mental, and social needs of clients. Social workers provide an array of clinical, case management, and advocacy services to individuals, families, and communities, all of which are essential for older adults (Rosen and Zlotnick, 2001). In light of the current and impending demographic changes in our society, it is certain that the services provided by geriatric social workers will be critically important in responding to the growth in the numbers of older adults, many of them reaching very advanced old age and thus increasingly frail (Geron, Andrews & Kuhn, 2005). However, despite the critical need for skilled workers in aging, research shows that there is a severe shortage of social work practitioners trained to work with older adults (Scharlach, Damron-Rodriquez, Robinson, & Feldman, 2000; Gonyea, Hudson and Curley, 2004).

In Chicago, Illinois the role of social work in meeting the needs of the aging population has not gone unnoticed. Neither has the reality that there will be a significant shortage of professionals to meet the health and social service needs of older adults. Nisson and Dolores Pearl, both experienced social workers, have designed an innovative program to address this problem. In 2002, the Pearls' approached NASW's Illinois Chapter with the idea for a project to bring retired social workers back into the workforce to work with the aging population. They saw retired social workers as an untapped resource; professionals with years of experience who could, and should, be encouraged to re-enter the field. With support from the Retirement Research Foundation and the NASW Illinois Chapter, the Pearls' Retired Social Workers Project has a three-fold purpose: 1) to bring retired social workers back into the field to serve older adults, 2) to work with agencies to highlight retired social workers as an untapped resource for staffing, and 3) to demonstrate that older adults are productive members of society.

As part of the goal to bring retired social workers back into the field to serve older adults, the Project is offering a number of professional development and education programs focused on services for seniors. Although retired social workers have years of experience, that experience is varied, with some having worked previously with older adults, and others being new to the field of aging. Thus, the Retired Social Workers Project is preparing its members for re-entry to the field through a range of training opportunities. One of the opportunities is an innovative blended model training program provided by the Institute for Geriatric Social Work at Boston University.

### Institute for Geriatric Social Work

The Institute for Geriatric Social Work (IGSW), located at Boston University School of Social Work, was established to improve the quality and increase the availability of geriatric social work practice by helping social workers meet the challenges presented by the diverse and growing aging population. In order to meet the need for trained practitioners, IGSW, through a grant from Atlantic Philanthropies, has developed training that enhances social work knowledge and skills in working with older adults. Building upon the school's historical commitment to the field of aging and strength in geriatric teaching, research and training, IGSW aims to address key challenges facing the social work profession in transferring practice skills to social workers through a broad range of education and training program.

IGSW's initial training efforts focused on developing educational programs across the country, including face-to-face training sessions at conferences, schools of social work, community-based agencies and other settings. The Institute also offers online training courses, web seminars and home-study courses, through which social workers can gain access to training at home or in the office. These courses are specifically designed to reach those practitioners who seek a convenient, accessible and low-cost alternative to traditional face-to-face training. Over the past three years, IGSW has provided training to more than 22,000 practitioners in geriatric social work.

### Retired Social Workers Training Program

The Retired Social Workers Project identified IGSW as a resource for education and training and proposed a collaboration to provide an innovative training program for retired social workers. Following an assessment of participant training needs, a training curriculum was developed and implemented. The Retired Social Workers Project Training Program is a blended model training program consisting of both online and face-to-face courses. The online courses are provided by the Institute for Geriatric Social Work and the face-to-face sessions are facilitated by Dr. Marcia Spira, Associate Professor, School of Social Work, Loyola University of Chicago.

The training program is comprised of a combination of four face-to-face training sessions and seven online courses addressing basic topics in social work practice with older adults. This type of "blended model" has been identified in the literature as providing the best results when using e-learning (Carter, 2004; Welsh, Wanberg, Brown and Simmering, 2003). The benefits of incorporating face-to-face training with online learning is that it can provide learning experiences that will satisfy the needs of a wide variety of learning styles as well as increase the learner's comfort level (Garrett and Vogt, 2003). Research has demonstrated a positive relationship between having a "live" train-

In light of the current and impending demographic changes in our society, it is certain that the services provided by geriatric social workers will be critically important in responding to the growth in the numbers of older adults.

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ing component and degree of perceived learning outcome and participant satisfaction with training (Aragon, 2003). Further, this training program was designed to incorporate key components of training that promote transfer of practice skills in social work practice. The training program emphasizes practice competencies through identification of knowledge, skills and values prior to curriculum development and provision of a combination of core courses and electives to target individual deficits in knowledge, skills and values (Baldwin and Ford, 1988; Curry, Caplan and Knuppel, 1994; Naito-Chan, Damron-Rodriguez and Simmons, 2004).

For the initial face-to-face session, program participants were provided with an introductory overview of the training program and instruction on e-learning, including an online course demonstration and detailed instructions on accessing the online courses. Participants were then given two months to complete their first two required courses, "Basic Issues in Aging" and "Geriatric Assessment" online. Following the first two online courses, the group convened for a second face-to-face session to review and supplement the online course material. Participants were then given another two months to complete an additional two required online courses, "Coping with Grief" and "Medications and Aging." These courses were followed by another face-to-face session to supplement the online course material.

With the completion of the four required courses, participants were then given the opportunity to take three elective courses in such topics as mental health, substance abuse, caregiving, and community-based resources, all with a focus on the older adult and the role of social work in working with older adults. These courses were chosen from a course catalog of over 20 additional online courses in aging available from IGSW. Offering "electives" allows for learner choice, an important element in adult learning. Further, the wide range of course options incorporate case studies, skill-based exercises, and opportunities for learners to think creatively about practice skills. Such variation in training approaches has been linked to the effective transfer of training skills (Davenport, 1992; Garavaglia, 1993; Salas and Cannon-Bowers, 2001; Johnson and Aragon, 2003; Carter, 2004).

Participants conclude the training program with a final face-to-face integrative session, where they again review and supplement online course material. Following completion of the training program, participants receive approximately 30 Continuing Education Units, depending on which elective courses are chosen, and a Certificate in Aging from IGSW.

### Online Education for Older Adults

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Adult learners are the fastest growing population in higher education, as indicated by a 170% increase between 1970 and 2000 (Aslanian, 2001; University Continuing Education Association, 2002). Bishop and Spake (2003) identify "the growth of continuing education programs, economic necessity, the rapidly changing job market, changes in the economy, and the simple aging of student populations" as factors that might influence this phenomenon (p. 374). With its focus on continuing education, IGSW has a vested interest in providing affordable and accessible quality continuing education for social work professionals.

Traditionally, continuing education for practitioners occurs in short didactic sessions or workshops where knowledge transfer is emphasized more than skill or attitudinal development (Langer & Tirrito, 2004). However, the trend in acquiring continuing



education has moved to the online world. Online courses complement the face to face trainings that so many social workers already attend. While there can be little time for in-depth in-service training, online training can provide an environment to develop practice skills for working with older adults. Indeed, research indicates that social workers increasingly rely on the Internet and have access to computers at work and that the Internet will be progressively used for professional education (Johnson & Aragon, 2003; Salas & Cannon-Bowers, 2001). According to Murray (2003), "not only is technology becoming more ubiquitous, it is being used more competently by more people from all nationalities, age groups, and socioeconomic levels" (as cited in Howell, Williams, & Lindsay, 2004).

In developing its online training, IGSW undertook a planning process that included focus groups with practicing social workers, literature reviews, and research on adult learning theory and evidence-based practice. Research shows that adult learners learn best when training is interactive and participatory, involves feedback, mentoring, and role playing, and incorporates specific elements that foster changes in attitudes, cognition, and behavior. These features have been incorporated into the development of all IGSW online trainings. The goal has been to create online courses that provide social workers with a meaningful learning experience that is skills-based, incorporates the latest in theory and research, and is affordable and accessible. In addition, the expertise of academics and practitioners in aging, has been utilized to develop content that reflects the competencies and core training areas needed in gerontological social work.

All IGSW courses are self-paced, participatory, and interactive. Each course specifies skills-based learning objectives as well as knowledge and values objectives. Both the content and structure of each course are designed to address the knowledge, skills and values essential for competent practice in the course topic area. Instructional methods are used that have been shown to enhance practice skills and encourage interactivity. Included in all the courses are short video clips of an interview with an aging expert or a video vignette that highlights current practice issues. A forum feature provides access to a chat room on the course topic, allowing course participants to discuss the subject matter and build an online community of fellow professionals.

The components of IGSW online courses have been developed using a competency-based approach and are based on adult learning theory, as well as theories on e-learning. The Retired Social Workers Project Training Program is the first opportunity to examine the applicability of the courses to older adult learners.

## Findings

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As part of their participation in the Retired Social Workers Project Training Program, trainees were asked to provide demographic information, complete a pre- and post-test self-assessment of their geriatric social work skill competencies, and provide information on their expectations of the training program. Participants were also asked to complete course evaluations following each online and face-to-face session, as well as a midpoint evaluation to gather qualitative information on participant experience with the blended model training program. For the purposes of this paper, participant profile information and pre-post test data on geriatric social work competencies will be presented.

Research shows that adult learners learn best when training is interactive and participatory, involves feedback, mentoring, and role playing, and incorporates specific elements that foster changes in attitudes, cognition, and behavior.



## Training Retired Social Workers: Experience and Innovation to Serve the Aging Population

### Participant Profile

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Initially, 28 retired social workers signed up to participate. Twenty-one completed the training program. The majority of program participants were female (81%). The majority (81%) identified themselves as Caucasian/White, while 14% identified as African American/Black and 5% identified as Hispanic. Although participant ages ranged from 36-72, the vast majority (67%) were over age 60, with an average age of 61.

In terms of social work status, all participants had an MSW, while one had a Ph.D. in social work as well. Seventy-five percent of participants were currently licensed during the program. While experienced practitioners, with an average of 25 years in the field of social work, participants were largely new to geriatric social work, with 48% having never worked with older adults and the remainder having worked an average of only 5 years specifically in the field of aging. Indeed, 71% report that they have spent 25% or less of their social work careers working with older adults.

In addition to having little experience working in the field of aging, many participants have received little or no training in aging. The majority (71%) did not take a course in aging as part of their educational program. Of those did, the average number of courses was 2. While many have not taken courses in aging, 19% did identify as having an aging concentration or certificate. This may be a result of either professional experience or continuing education. Although over half (57%) of participants reported having no training in aging, those with training reported an average of 7 trainings over the past 5 years.

### Geriatric Social Work Skills

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The retired social workers training program participants completed a pre- and post-test self-assessment of their geriatric social work skills, using the Hartford PPP Geriatric Social Work Competency Scale II. Developed by the Hartford Geriatric Social Work Practicum Partnership Program (PPP), this scale measures the degree of skill competency of social work students and practitioners who specialize in practice with older adults and their families (Damron-Rodriguez, 2006). This 40-item instrument is a shorter, revised version of the Social Work with Aging Skill Competency Scale previously developed by the PPP. The instrument is divided into four domains: Values, Ethics and Theoretical Perspectives, Assessment, Intervention, and Aging Services, Programs and Policies. It measures the respondent's perceptions of their skill level on a scale of 0 to 4 (0=not skilled at all; 4=expert skill). Scores can be derived from evaluating individual items, combinations of individual items by domain, or the total competency score of all items. The maximum score for total competency is 16. Mean scores are derived by dividing the total score or the scores in each domain by the number of items.

Competency scores are reported in percentage of the maximum score for each competency domain. As indicated in Table 1, the highest skill area for the training group participants, at both pre and post-test was values, ethics and theoretical perspectives, while the lowest skill area, and area of least growth, is aging services, programs and policies.

Table 1. Average Competency Scores

<i>Domain</i>	<i>Average Score Pre-Test</i>	<i>Average Score Post-Test</i>
Values, Ethics and Theoretical Perspectives	57%	86%
Assessment	46%	75%
Intervention	53%	81%
Aging Services, Programs and Policies	37%	61%
Overall Competency Score	48%	75%

A paired samples t-test was conducted to examine pre-post differences in each competency domain and overall competency score. As illustrated in Table 2, results show that participants assessed their geriatric social work skills as substantially improved following participation in the IGSW training program.

Table 2. Pre-Post Competency Outcomes

<i>Competency Domain</i>	<i>Pre-Test</i>	<i>Post-Test</i>	<i>p-value</i>
Value and Ethics			
Mean	2.3	3.4	.002**
Standard Deviation	.95	1.1	
Assessment			
Mean	1.8	3.0	.000***
Standard Deviation	.94	.69	
Intervention			
Mean	2.1	3.3	.000***
Standard Deviation	.92	.81	
Aging Services			
Mean	1.5	2.4	.000***
Standard Deviation	1.1	.96	

\*\* p<.01    \*\*\*p<.001

The findings reported are only the beginning of our understanding the effectiveness of providing a blended model training program in geriatric social work to older adults.

### Assessment of Training Needs

Participants were asked to rate the importance of 11 topic areas on a scale of 1 to 10, with 1 being least important and 10 being most important. All topic areas received relatively high ratings of importance, with average scores ranging from 7.21 to 9.19. The topics receiving the lowest average scores were housing and substance abuse. The topics receiving the highest average scores were geriatric assessment and legal and ethical issues. Additional training topic areas of interest included medications and older adults, retirement issues, coping with loss, aging policy and research, spirituality and aging, intimacy and sexuality among older adults, cognitive functioning, healthy aging/wellness, and assistive technology.

## Training Retired Social Workers: Experience and Innovation to Serve the Aging Population

### Program Expectations

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Following a detailed description of the training program structure and requirements, participants were asked to rate their expectations of the training program. In general, participants expected the program to be somewhat difficult but extremely interesting and convenient. After reviewing the curriculum, participants generally expected their practice skills with older adults to improve significantly. The data indicated a wide range of knowledge and skill levels, with participants claiming they already knew between 5% and 75% of the material covered by the training program, with an average of 34% of the material already known.

Participants were asked to identify their plans upon completion of the training program. As part of the goal of the Retired Social Workers Project is to train and prepare retired social workers for re-entry into the workforce, it is not surprising that employment, both current and future, was a common plan for participants. Participants identified three major plans upon program completion: 1) integrate/apply new knowledge in current professional practice, 2) seek employment in geriatric social work, and 3) utilize new knowledge for personal benefit.

Participants were also asked to identify potential benefits and challenges of program participation. Key benefits identified included enhanced knowledge and/or skills and work or volunteer opportunities, either prospective opportunities or opportunities to apply to current work. Additional benefits included networking with other program participants and personal growth. The majority of respondents identified no potential challenges to program participation. Those who did identify potential challenges cited computer skills and equipment, time constraints, and a lack of opportunity or experience to apply the knowledge gained from the training program as a potential challenge.

### Conclusion

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As a result of the Retired Social Workers Project Training Program, twenty-one retired social workers from Chicago received a Certificate in Aging from the Institute for Geriatric Social Work at Boston University. With training in aging, these professionals will be a vital contribution to the geriatric social work workforce. Due to the success of the program, the Retired Social Workers Project of Chicago, Illinois will continue to offer the IGSW Training Program, in addition to its other education and training opportunities. The findings reported are only the beginning of our understanding the effectiveness of providing a blended model training program in geriatric social work to older adults. For the purposes of this project, individual course evaluations will be analyzed to assess the effectiveness of the course content, design and format in meeting the needs of older adults learners. Of key importance will be further analysis of the impact of the IGSW online training program on the retired social workers geriatric social work skills, as well as the applicability of courses designed based on adult learning theory to older adult learners.

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## Seniors CAN: Community-Based Education to Promote Independence for Older Adults

**Claudia C. Collins**

### Abstract

*Seniors CAN is a program that promotes increased mastery and decreased loneliness and stress in older adults. The interactive educational format encourages participants to integrate one skill they learn in each class into their daily lives. The improvement in participants' levels of mental functioning and active engagement in life directly influence older persons' overall quality of life. Results obtained from Seniors CAN encourage greater utilization of interactive education for older adults.*

### Introduction

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The concept that cognitive functioning always declines with age has been challenged by research demonstrating that older persons can actually improve their cognitive skills (Baltes, Sowarka & Kliegl, 1989; Hayslip, Maloy & Kohl, 1995; Schaie & Willis, 1986). Some contend that the mind-body connection becomes more powerful as we age and that successful aging would include maintaining high levels of mental and physical function and “active engagement with life” while also decreasing the risk of disease and associated disabilities (Rowe & Kahn 1998).

Since education is most often associated with children, adolescents, and young adults, with the learning process ending at adulthood, theoretical research about learning styles has predominantly focused on children or teens. New research demonstrates the importance of ongoing mental challenges to keep the brain engaged making successful aging a “use it or lose it” proposition for the brain as well as the body (Diamond, 1993; Snowdon, 2001). The increase of healthy older adults involved in the educational process is being redefined and opportunities to continue learning later in life are becoming a reality and according to some (Paggi & Hayslip, 1999), a necessity.

Higher educational levels for older adults have been linked positively to more successful aging (House et al., 1994) and a sense of control that is a predictor of healthier aging (Mirowski, 1998; Ross and Van Willigen, 1997; Schieman, 2001:15). Ross and Wu (1995) found the better educated had more social support and better health behaviors such as exercise, moderate drinking and less smoking.

There is a growing realization that learning is a lifelong practice and that education

or continual learning helps maintain mental acuity by improving mastery. Mastery, or a sense of personal control, relates to an individual's belief that their own choices and actions determine outcomes in their lives (Mirowski & Ross 1990). The concept of mastery is described by a variety of names including: self-efficacy (Bandura, 1989; Downey & Moen, 1987; Gecas, 1989) and personal autonomy (Seeman & Seeman, 1983).

Increased mental activity can enhance feelings of greater personal control that can then improve chances for successful aging (Baltes & Baltes 1990; Brandtstadter & Baltes-Gotz, 1990; Schulz & Heckhausen, 1996). A sense of mastery is related to fewer depressive symptoms (Ensel, 1991; Holahan & Holahan, 1987; Krause, Herzog & Baker, 1992) and higher self-rated health (Grembowski et al., 1993). Self-rated health has been found to be a stronger predictor of mortality than physician-assessed health (Mossey & Shapiro, 1982).

Two other factors related to mastery and healthier aging are reduced stress and loneliness. Loneliness has been shown to negatively affect health outcomes for the elderly including increased mortality (House, Landis & Umberson, 1988), decreased recovery from illness (Berkman, Leo-Summers & Horowitz, 1992) and more utilization of health services such as admission to nursing homes (Freedman, 1993). Older adults with stronger social support systems are better able to cope with stress than their lonelier peers (Krause, 1986). Stress, or the perception that one's recent daily life is uncontrollable or unpredictable, can be a negative indicator of mastery (Cohen, Kamarck & Mermelstein, 1983).

Education can be used to acquire a new skill, pursue a lifelong interest, or enhance social relationships. Whatever form education takes, it "offers a means for better comprehending the complexity of life and relating oneself more adequately to the complexity" (Peterson 1985, p. 2). We do know that adaptability is a crucial survival skill and that in a changing society older adults will have to adapt to survive (Tennant 1990). Educational activities can provide a road map for older adults to adapt and remain active in society (Ventura-Merkel & Doucette, 1993).

The purpose of this manuscript is to examine a learning style that has increased the mastery and decreased loneliness and stress in older adults who have taken a community-based educational program, *Seniors CAN*. Any educational program that demonstrably increases these healthy and successful aging factors could improve quality of life for seniors by initiating or reinforcing preventive behaviors and improving self-reported health. The program can serve as a model of interactive and participatory learning style for older adult education (Collins, 2001, 2006).

### Program Description/Intervention

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Developed in 1999 by the University of Nevada, Cooperative Extension, the *Seniors CAN* program provides life-skills education to help the senior population maintain high-quality independent living by enhancing mental acuity and mastery. The program's theoretical basis lies in research demonstrating the importance of lifelong mental activity and its positive role in successful aging. The curriculum (Collins & Hernandez, 2000, 2004) is currently being utilized in more than 29 states and Canada and is listed on the Centers for Disease Control, Health Promotion and Education Database as well as the USDA Food Stamp Nutrition Connection Database.

Using lifelong learning theory as the conceptual framework, the curriculum includes fifteen lessons: four on nutrition; four on personal safety; two on food safety;

New research demonstrates the importance of ongoing mental challenges to keep the brain engaged making successful aging a "use it or lose it" proposition for the brain as well as the body.

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two finance related; two on general health; and one lesson on productivity. Topics relate to nutrition (e.g., food groups/portion size, food safety, hydration, low-cost foods/meals), wellness (e.g., reducing falls, the importance of hand washing and immunizations such as flu/pneumonia shots), and economics (e.g., prevention of consumer fraud, and finding part-time employment).

The four-month-long program is taught in weekly sessions that run approximately two hours, giving participants an average of 32 hours of interactive class instruction. Primarily, instruction has been at congregate sites including public housing and senior centers. Instructors have been extension paraprofessionals, volunteer peer-educators and staff of senior centers and elder housing complexes. The audience includes diverse ethnic groups as well as the elderly at all economic levels.

### Teaching Style

*Seniors CAN* incorporates several teaching styles found to be most effective with older adults who are a diverse group of learners with multiple perspectives on learning. Truluck and Courtenay (1999) found differences in learning style preferences based on age subgroups within the older adult population. They found adults age 55 to 65 prefer to learn by *doing* (accommodators), those 66 to 74 prefer to learn by *watching and listening* (divergers) and those over age 75 want to not only learn by watching and listening but also by *thinking* (assimilators). An educational program for older adults should incorporate facets of all three styles.

The *Seniors CAN* lesson-format is an interactive educational process that utilizes teaching techniques designed to enhance cognitive function for older adults. This reflects a strong connection between research-based theory and actual practice. Learning is not restricted to the classroom. Classes include demonstrations of how the curriculum information may be readily applied and provides opportunities for participants to share their experiences. Class size is limited to no more than 20, so that each participant can comfortably ask questions that help make the material relevant to their individual situation. Often during this exchange of ideas and experiences, peer education evolves (*watching and listening*). For example in the class on hydration, usually at least one student has previously been hospitalized for dehydration and can share a story that gives life to an otherwise abstract concept.

If growth-centered education is crucial to self-reliance, then a successful teaching environment must promote learner participation. Older learners acquire knowledge more effectively in a collaborative learning environment where new ideas and information are related to and built upon students existing knowledge and real-life everyday experiences.

To reinforce the application of lesson information, *Seniors CAN* instructors ask each student to try and integrate one skill they learn in each class into their daily lives (*doing*). Participants are encouraged to volunteer for "homework" assignments. This gives them the opportunity to "test drive" the information between the weekly classes by applying it, modeling the crucial step of incorporating empowering behavior changes into daily life. Participants often have questions or challenges and when they report their experiences back to the group, also offer unique suggestions. The homework could take the form of a specific problem that participants are to solve, given the information from the class. As an example, after the presentation on "Reducing the Risks of Crime," participants could be asked to practice saying, "No," or hanging up on telemarketers, techniques discussed in the lesson.



### Education makes individuals more effective users of information

Encouraging participants to report the results of their attempts to apply the material into their own daily experience facilitates peer learning. The “homework” makes the learning process experiential and all efforts, failures as well as successes, are praised and used as shared learning tools. Thus, new information is tied to the student’s experience and previous knowledge by being integrated into their present lives. They report what worked, what didn’t work, and the creative ways they handled the challenge—thus accomplishing peer education from true “life experts.” By incorporating educational materials into their everyday lives (*doing*) and having the process validated in a supportive, non-judgmental environment of other lifelong learners (*watch and listen*), abstract concepts become a concrete part of their reality (*thinking*).

This process also involves sharing learning responsibility equally between teacher and student as well as among students. It is crucial that mutual respect be a consistent part of this process. Older adult students have a wide variety of life experiences, a broad spectrum of backgrounds and diverse ways of thinking. The information conveyed in the lessons must be deemed *relevant* by them. It also has to be *logical*, building upon their prior knowledge and real-life experiences. They compare information to their past experience and must be allowed to ask questions in a safe non-judgmental environment.

Participants’ beliefs, knowledge and values have developed over many years and they need to clearly see how to utilize new information. The successful instructor acts more as a facilitator to help participants organize the lesson information around problems they may have and participants must be encouraged to ask questions as part of the process of determining relevance to their lives.

### The process of learning creates confidence in the ability to solve problems

By encouraging participants to try something new in their lives after each lesson, they can see if it works, i.e., is the information relevant. The process opens them to further changes. Even an initial lack of success can be handled through peer-education in the group through the process of sharing as participants hear how others adapted the information and incorporated it into their lives.

Another important aspect of the *Seniors CAN* program relates less to the actual information conveyed in the lessons than to helping students learn how to access information sources. A one-way flow of information from the instructor can foster dependence. On the other hand, teaching them in a guided way to discover information on their own and report back to the group, where their efforts are respected and praised, helps create further independence and sense of control, i.e., mastery. For example, when discussing ways to save money, students investigate and report to the class on “senior discount days” at local stores. Actively involving students in cooperative learning in discussion groups is much more effective than a passive lecture environment. People who have survived and thrived for decades do better in a positive and trusting learning environment where all are made to feel welcome, comfortable and respected.

### Participant Population

The program appeals to seniors from a wide variety of cultural and ethnic backgrounds and from varying educational and income levels. The sample (N=579) includes participants from 56 program sites, including low-income housing and senior centers in urban and rural Nevada whose age ranged from 52 to 93 years. A majority was female

If growth-centered education is crucial to self-reliance, then a successful teaching environment must promote learner participation.

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(78%) and Caucasian (65%). The ethnic affiliation of other participants included Latino (15%), African American (11%), Asian American (7%) and Native American (2%). More than ten-percent of the participants were taught in Spanish.

Nearly 70% of participants reported a household income less than \$19,999 per year, with 31% under \$9,999. Twenty-two percent reported an income between \$20,000 and \$39,999 per year, and 10% had incomes that exceed \$40,000 per year. With respect to formal education, 17% had not completed high school; 33% had a high school diploma; 27% reported some college; and 22% had a baccalaureate degree or greater.

The program attrition rate was less than 4%. The most common reasons given for leaving the program were illness of participant, spouse or family member.

### Program Evaluation and Impact

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Impact of the *Seniors CAN* Program has been measured quantitatively and qualitatively and with ongoing process evaluation. To quantitatively assess the impact of *Seniors CAN*, participants complete three self-rating scales at the beginning and end of the four-month-long program: the Mastery Scale (Pearlin & Schooler, 1978), the Revised UCLA Loneliness Scale (Russell, Peplau, & Cutrona, 1980), and the perceived stress scale (Cohen & Williamson, 1988).

### Results

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Participants demonstrated statistically significant improvements from pre- to post intervention with increased mastery and decreased loneliness and stress ( $p < .0001$  on each assessment instrument) (Collins & Benedict, 2006). While the quantitative analysis indicates improvements in factors related to better health and successful aging, even more important impact is reflected in participants' enhanced demeanor and life outlook. Their improved sense of control in life comes from the empowerment of beneficial behavior change in a supportive environment of peers and the opportunity to play a constructive role amongst their peers.

They reflect growing confidence, working together and socializing with people they did not know weeks before. Participants make changes in their eating behaviors, in their interaction with health professionals and reflect a renewed sense of self-assurance and more enthusiastic approach towards life. They report using health-related behavioral techniques that include emphasis on hand-washing, reading food labels, increased water consumption for hydration, greater care in food handling and storage. One *Seniors CAN* student said, "I'm 81 and I learn so many things that help day-to-day. You'd think at my age I'd know more!"

The results of this research have implications for developing future programs for older adults. Elderly students need time to ask questions and discuss their experiences in doing "homework" between classes. The crux of the project's success is incorporating lesson-related information into their daily experience—converting abstract concepts into practical application.

Many participants stated that the information gave them "more control of their lives," a goal of the program directly related to the theoretical model connecting learning with mastery. A number of the elderly participants reported being more aware of what they eat and how it affects their health. One student reported that the information conveyed in the program had "jarred me out of my comfort zone" and opened a new

world of information.

*Seniors CAN* graduates tell of acquiring life skills and behavior changes that include removing hazards from their homes that might cause falls, adding their names to telemarketing “do not call” lists, saving money, decreased food portion sizes, increased reading of food labels, greater fluid intake, purchase of lower fat dairy products, improved hand-washing, and more careful food preparation to prevent bacterial cross-contamination. Comments from program graduates include: “I learn something new each class I go to,” and “I love the discussion with the others.”

A participant in her seventies commented on just how many new things she incorporated because of the class: she had a hand rail installed in her shower; signed up for a senior-sponsored hospital program for the activities; and had checked her credit report. Another participant said, “I have been asked in this class to try things, like using this refrigerator thermometer, that I have never done before. And I like it! I even started eating better and exercising.”

Refrigerator thermometers are distributed as a learning tool in the program. One demonstrable impact has been that several participants in low-income or congregate housing have found their refrigerators did not cool properly, a food safety hazard, and the property manager(s) replaced those refrigerators.

Senior center directors’ report having difficulty getting older adults to participate in any long-term wellness programs, despite the recognized need for such information. They found this was not the case with *Seniors CAN*, which was easy to replicate and well attended. They reported having many requests to repeat the program. Participants said, “they loved the social interaction with their peers and found the program to be ‘fun’ and ‘interesting.’” One senior center director said, “The seniors seem so grateful for the information, the attention and the sharing.”

The interactive aspect of the program emphasizes providing information that the students report that they need. A major goal is to listen to the questions that the older adult students actually ask, not present answers to the questions they should have asked. This is an important distinction. Educators can get caught in the lecture mode with the implication that “I have the information, they should know this.” Perhaps they should, however, if information is not seen as directly related to the older learner’s everyday life the message could be lost. As an additional benefit, we also found the instructors in this open atmosphere of educational dialog reported they usually learn something new in each class.

## Conclusion

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Information on life skills that relate to nutrition, wellness, personal safety, and economics can provide tools for successful aging. At the same time the educational process that provides this information can, in itself, become a part of healthier aging by rewarding continued learning and increasing the sense of control or mastery over life. Participants in the *Seniors CAN* Program tested significantly higher in mastery and lower in loneliness and stress over the course of the sixteen-week program, demonstrating a strong relationship between life skills education and mastery.

Most participants attracted to and retained in the *Seniors CAN* program are lifelong learners. Despite their level of formal education, economic status or ethnicity, this group showed improvement in factors related to better health outcomes and more successful

The improvement in levels of mental functioning and “active engagement in life” can have direct measurable impact on quality of life...

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aging. In fact, lower income and minority program participants showed the greatest improvement in sense of control and decreased loneliness, suggesting that the program may have the greatest impact on those at highest risk.

The *Seniors CAN* program offers opportunities to learn about matters that may improve older adults' health and quality of life; increase their sense of personal control; decrease their loneliness by sharing learning with others who have experienced similar life events; and further develop their potential to make important contributions to their community. The improvement in participants' levels of mental functioning and "active engagement in life" (Rowe & Kahn, 1998) can have direct measurable impact on quality of life, and these results should encourage greater utilization of interactive education for older adults.

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# Lifelong Learning in the United States and Japan

**Kelly Young and Ed Rosenberg**

## Abstract

Assuming learning to be a lifelong process, it is important to provide older adults with the opportunities to pursue educational activities. The growing number of older adults in America and globally has led to an increased demand for educational programs in many nations. As a concept, lifelong learning emphasizes the potential to provide useful learning opportunities for older adults. Lifelong learning has become an international issue; many countries have developed lifelong learning policies. The United States and Japan represent two nations that have taken very different approaches in implementing lifelong learning for older adults. This paper examines the programs available to older adults in the United States and Japan. It is suggested that variations in lifelong learning policy and programs are explained by cultural and social structural differences between the United States and Japan. Recommendations for expanding and improving existing programs are also considered.

## Introduction

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Learning is a significant force in people's lives. In many societies, children become familiar with formal education at a young age, although the role and content of their education varies with cross-cultural variations in education-related values. In many nations students transition to some form of optional higher (e.g., postsecondary) education after completing compulsory education. It is often assumed that once a diploma or degree is obtained, one has learned all that is necessary to function successfully in adult life. Learning, however, continues throughout adulthood. The desire and need for new learning experiences does not diminish with age.

Humans do not stop learning because they age; the desire to learn can remain strong across the lifespan. Unfortunately, the educational needs of older adults (in this article defined as age 65 and over, unless otherwise noted) are often overlooked due to prejudicial and typically inaccurate beliefs that they lack the interest and/or abilities to continue education. But because the ability to learn does not cease at any particular age, older adults deserve opportunities to continue their education commensurate with those of younger adults. Many elders need opportunities to express themselves and under-



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stand the limitations and uncertainties of aging, and their reactions to these. In any society, educational opportunities for older adults become increasingly salient as its elderly population continues to expand.

In the United States the size of the older population has grown dramatically. In 1900, people over age 65 comprised 4 percent of the United States population. By 2000, this age group made up over 12.4 percent of the population. In 2011 the first Baby Boomers (born between 1946 and 1964) turn 65, and it is predicted that by 2030 Americans 65 and older will account for 19.6 percent of the population (U.S. Census Bureau, 2002, 2004).

However the growth of the older population is not confined to the United States; the vast majority of nations is now experiencing or will soon experience rapid growth in their older populations. People over age 65, now seven percent of the world's population, is expected to increase considerably by 2050 (U.S. Census Bureau, 2005). For example, Japan is aging more rapidly than any other industrialized country. In 1900, people age 65 and over comprised 5.4 percent of the population. By 2000, the elderly represented 17.3 percent of Japan's population, and may comprise as much as 29.6 percent by 2030 (Ministry of Internal Affairs and Communications, 2005).

As populations continue to age at home and abroad, adult education becomes increasingly important. By allowing older adults to sustain self-efficacy and cope with the aging process, such programs can provide older adults with the resources to maintain their standard of living and can assist them with managing life changes related to the process of aging.

In the United States the growth of the older population, as well as generational traits (e.g., younger generations have more years of education than do older generations), have led to increased demand for educational programs that cater to the needs of this group of learners. Educational programs that allow adults to continue their development and express themselves in creative ways are especially needed in a society like the United States, which has a history of valuing youth and denigrating old age. Adult education and lifelong learning are means for responding to the educational needs of older adults and for providing more accessible learning opportunities.

The terms education and learning are often used interchangeably, one result being that education and, by implication, learning are often considered to occur only in formal settings. There are, however, differences in the meaning of *adult education* and *adult learning* and where each of these activities takes place. *Adult education* is concerned with specific learning outcomes and the processes required for assisting students in achieving those outcomes (Thomas, 1991, as cited in Merriam and Brockett, 1997, p. 6). *Adult learning*, on the other hand, is a cognitive process internal to the learner and encompasses the unplanned, incidental learning experiences that are part of everyday life (Merriam and Brockett, 1997, p. 6).

That said, it is also possible to disaggregate *adult education activities* into formal learning activities, non-formal learning activities and informal learning activities. Formal learning occurs in educational institutions and usually leads to credit or a degree. Non-formal learning refers to organized activities occurring outside the formal system in settings such as churches, senior centers and voluntary associations. Informal learning refers to that which is learned from the experience of everyday living (Merriam and Caffarella, 1999, p. 21).

Adult education and the variety of contexts in which it occurs are considered to be a part of lifelong learning; however, even when widely defined, lifelong learning encompasses much more than adult education. Lifelong learning, conceptualizing education and learning as a lifetime pursuit, has as its overall goal the restructuring of existing educational systems to better develop the potential for education outside formal settings; thus lifelong learning promotes education across the lifespan and provides everyone with opportunities for educational development.

Implementing or expanding lifelong learning is one way to improve social conditions for older adults whose status and authority have been eroded, often by the forces of modernization. Cowgill (1986) argued that modernization has become the major force undermining the social status and power of the elderly (p. 181). Modernization theory asserts a systematic inverse relationship between the breadth and level of modernization in a society and the status and condition of its older population (Cowgill, 1986). Improvements in health and economic technology, increasing urbanization and education, and a faster rate of social change are the most significant factors contributing to the declining status of the aged.

Social exchange theory provides another perspective to help to explain the importance of promoting education for older adults. Social exchange theory applies a cost-benefit model to social interaction. It posits that withdrawal and social isolation of older adults does not result from individual desire, but rather from the unequal exchange between older adults and non-elderly members of society and the elders' perceived need to conserve their diminishing resources and social power for their most important needs, activities and relationships (Dowd, 1980).

Examining educational policies and their outcomes is thus a first step in determining if enhancing educational opportunities can reduce the hypothesized negative effects of modernization on the social status of older adults. Because the United States and Japan are both modern, post-industrial countries with large and increasing older populations, the forces of modernization have most likely had a dramatic impact on the status of older adults in both nations. However, cultural differences between the countries may well have played a significant role in the development and provision of educational policies affecting the elderly. An examination of educational opportunities for older adults in these countries can reveal those policies with the most potential for improving the status of older adults, and the relationship between culture, social structure, and learning opportunities for older adults.

An historical review of lifelong learning and adult education in the United States and Japan will illustrate what actions have been undertaken thus far and what remains to be accomplished in terms of educational opportunities for older adults. We also examine the impact of modernization on the status of the aged and the prospects of lifelong learning for improving the well-being and social status of older adults. This research will describe how American-Japanese variations in cultural attitudes and values enhance or inhibit lifelong learning opportunities.

Although adult education and lifelong learning can take many forms, this article focuses on learning occurring in formal settings due to the availability of information on activities occurring in these settings. Government policies for promoting adult education and lifelong learning in both countries will be of particular interest.

Educational programs that allow adults to continue their development and express themselves in creative ways are especially needed in a society like the United States, which has a history of valuing youth.

## Lifelong Learning in the United States and Japan

### The Concept of Lifelong Learning

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The emergence of the concept of lifelong learning can be traced back to the 1960s and the radical intellectualism of the student movement, with its demand for new forms of education that promoted diversity, pluralism and individual freedom (Field, 2001). Discussions of the concept were not isolated to individual countries but occurred in international gatherings led by intergovernmental bodies such as the United Nations Educational, Social and Cultural Organization (UNESCO) and the Organization for Economic Cooperation and Development (OECD). UNESCO was the major force in promoting global discussions of lifelong learning, strongly promoting the idea that education should occur universally and across the life span, and should not merely be formal education for a “privileged few” (Field, 2001). OECD advocated lifelong learning due to its potential for developing the human capital of workers.

Lifelong learning is based on three attributes: lifelong learning, lifewide learning, and the motivation to learn (Cropley, 1981, as cited in Schuetze and Slowey, 2000). The lifelong attribute emphasizes the importance of an individual’s formative years of education and how these experiences shape not only how one learns but also one’s motivation to engage in further learning. The lifewide attribute signifies that education occurs both within and without formal school settings; all forms of education are treated as a single learning progression. Finally, engagement in lifelong and lifewide learning depends on an individual’s motivation to engage in learning beyond compulsory schooling (Schuetze and Slowey, 2000). If an individual’s educational experience has been mostly unpleasant, the likelihood of being motivated to participate in non-compulsory lifelong learning is reduced.

The concept of lifelong learning did not enter the world of educational policy making until the 1970s. Few concrete policy developments emerged from discussions of lifelong learning because the concept was overshadowed by the changing economic climate of the times. The lack of power and influence held by the intergovernmental agencies, the main proponents of the lifelong learning, also limited the impact of the early debate upon policy and practice (Field, 2001). For example, the U.S. Congress passed the Lifelong Learning Act in 1976 but did not appropriate funds to implement it because the act was proposed as a solution for a group of “ill-defined problems” (Merriam and Brockett, 1997; Merriam and Caffarella, 1999). During the 1990s international interest in lifelong learning was renewed as the concept was promoted as a means for retaining economic competitiveness in a global market by increasing investments in human resources across the life span (Field, 2001). Although interest in lifelong learning continues its revival, concrete policy developments have failed to emerge in the United States.

In Japan, the concept of lifelong learning has enjoyed greater governmental acceptance. The goal of the Ministry of Education is to create a learning society in which people can learn at any stage of life, can freely select and participate in opportunities for study and can have the results of their learning appropriately evaluated. Officials want to promote the idea of engagement in learning across the life span, and to create a variety of routes to qualifications/credentials for those who ended school without them (Ministry of Education, Culture, Sports, Science, and Technology, 2005a).

## Adult Education in the United States

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Adult education in America emerged in response to specific needs at particular times, and its growth has been episodic rather than steady (Merriam and Brockett, 1997). Historical events and cultural preferences often merged to create unique forms of adult education. What one wants to learn, what is offered, and the ways in which one learns are determined to a large extent by the nature of society at any particular time (Merriam and Caffarella, 1999, p. 5).

This is clearly illustrated by an examination of the different focus and delivery methods of education in pre-industrial and post-industrial America. In the Colonial period, adult education was based on moral and religious grounds. Because literacy was tied to salvation, it was necessary for adults to be literate, not only to ensure their own salvation, but also that of their children (Stubblefield and Keane, 1994). In early America adults were responsible for educating their children. This practice continued after the revolutionary period, when republican ideals resulted in education focused on developing children and adults to be good leaders and citizens.

In the nineteenth century, as America became an increasingly industrialized society, the growth of knowledge in the natural and social sciences changed people's understanding of themselves and their relationship to the world. For people working in an industrial society, a classical education was no longer adequate preparation. Now education began to take on an increasingly utilitarian quality, since many citizens wanted an education that would provide them with the skills to be successful in practical occupations in commerce and manufacturing.

This shift led to the founding of mechanic's institutes and lyceums. Mechanic's institutes were societies for skilled workers and apprentices. Educational reformers believed that making education functional as well as accessible to mechanics would encourage scientific and technological discoveries that would promote social and economic progress (Stubblefield and Keane, 1994). Lyceums also focused on the dissemination of useful knowledge, but they catered to a wider audience than did mechanic's institutes. Lyceums are credited as constituting "the first adult education school system in the United States" (Hayes, 1932, as cited in Stubblefield and Keane, 1994). They were a major force in the mobilization of community support for adult education (Stubblefield and Keane, 1994).

Adult education did not emerge as field of study until the 1920s. During this time the Carnegie Corporation initiated a major campaign on behalf of adult education by identifying urgent national problems that could be addressed through education (Stubblefield and Keane, 1994). Since World War II, adult education has increasingly been tied to economic forces. Increased global economic competition and the shift from an industrial society to a post-industrial or knowledge-based society spurred educational agencies to emphasize retraining for skilled workers. Today, continuing education has become a way of life for many adults and adult education has become a mode of adaptation in the post-industrial economy (Stubblefield and Keane, 1994).

Lifelong learning is based on three attributes: lifelong learning, lifewide learning, and the motivation to learn.

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## Adult Education in Japan

In Japan, adult education is considered a part of lifelong learning. The contemporary phase of adult education in Japan began in 1949 with the passage of the Act for Adult Education. The Act established adult education centers in various communities throughout Japan and provided local authorities with a partial government subsidy to achieve its provisions (Fuwa, 2001).

The concept of lifelong learning was later introduced in relation to adult education and lifelong education in Japan. The Japanese first identified lifelong education as a relevant concept in the 1970s (Wilson, 2001). In 1971 the government issued a report stressing the importance of adult education and lifelong education in a changing society. The concept of lifelong education was later re-conceptualized as lifelong learning to reflect an emphasis on individuals as agents of their own learning (Wilson, 2001). Measures to formally implement lifelong learning began in 1990 with the enactment of the Law Concerning the Development and Promotion of Lifelong Learning (Fuwa, 2001). This law established the Lifelong Learning Policy Bureau, which coordinates and promotes lifelong learning policies. Advisory committees for lifelong learning were also established in all prefectures.

Lifelong learning in Japan has focused on reviewing the education system in order to create a lifelong learning society that promotes the idea of learning at all stages of life. This idea encompasses not only formal education but also nonformal activities or social or cultural education, which is learning through involvement in sports, hobbies, recreation, and cultural and volunteer activities (Ministry of Education, Culture, Sports, Science, and Technology, 2005b).

The Ministry of Education has been working to expand the diversity of available learning opportunities by promoting participation in various types of education, including formal and nonformal education, and sports activities. Attempts to expand access to formal higher education have included the development of a system for the special selection procedure of adult applicants, increases in evening course offerings, and special registration systems (Ministry of Education, Culture, Sports, Science, and Technology, 2005c).

Some scholars have argued that lifelong learning is a “lifeline” for Japanese society because it is a key means for addressing several issues of critical societal importance. Wilson (2001) suggests that lifelong learning can help Japan adapt to and cope with an aging society, improve community building and adjust to economic change. Like the United States, Japan has a growing number of older adults who have more income and time available for lifelong learning pursuits. Policy makers hope to minimize the physical care needs of this group by assisting them in developing a sense of purpose in life after retirement. Engagement in lifelong learning pursuits is one way of achieving this end. Social education, a component of lifelong learning, is viewed as a means to preserve and foster Japanese cultural practices that have diminished in importance with growing modernization (Wilson, 2001). Constantly changing social and economic conditions and the need to acquire new knowledge and skills to keep pace with these changes have also precipitated the need for lifelong learning in Japan. In addition, Japanese administrators view the promotion of lifelong learning as essential for remedying the harmful effects of their society’s preoccupation with academic credentials. The education system is being reformed to promote learning at all stages of life and to ensure that various types of learning are appropriately valued.

## Participation in Adult Education and Lifelong Learning

In order to provide the most useful educational programs, one should understand who participates in adult education and what factors motivate these individuals to participate. Understanding who participates can assist providers in determining participant needs and can provide ideas for attracting new participants. Much of the research regarding participation in adult education has focused on formal learning activities (e.g., Lamb and Brady, 2005); few studies of participation in nonformal and informal activities have been conducted (Merriam and Caffarella, 1999). Thus participation data in this section focus on adult education activities occurring in formal settings.

Since Johnstone and Rivera conducted the first national study on participation in adult education in 1965, the profile of the typical adult education participant in the United States has remained remarkably consistent. They found the typical adult education participant is “just as often a woman as a man, is typically under forty, has completed high school or more, enjoys an above-average income, works full-time, most often in a white-collar occupation, is married and has children, lives in an urbanized area but more likely in a suburb than large city, and is found in all parts of the country” (Johnstone and Rivera, 1965, as cited in Merriam and Caffarella, 1999, p. 47). This profile is consistent with that of a 2001 study, which differs from Johnstone and Rivera’s in that it found women more likely than men to participate in adult education (Kim, Hagedorn, Williamson and Chapman, 2004).

In the United States, younger people remain most likely to avail themselves of adult education, but the rate for the older population is fast catching up. While the participation rate for persons age 16-50 is 53-55 percent, 41 percent of adults age 66 and over participated in adult education in 2001. The lowest rate (22 percent) is for persons age 51-65 (Kim, et al., 2004).

Participants in Japan also appear to be middle aged or younger. According to a 1996 report from the Japanese Statistics Bureau, people aged 60 to 69 years old account for 20 percent of those engaged in learning or educational activities (Yamaguchi, 1998). A majority of learners are from middle class backgrounds and very few are from the working class (Fuwa, 2001). This suggests that participants in Japan are also in an above average income bracket and that they are more likely to be employed in white collar occupations.

Although participation in Japan and the United States favors the non-elderly, there are differences. Fuwa (2001) identified trends in Japanese adult education that elaborate upon participant characteristics. The majority of adult education participants in programs at local adult education centers are unemployed, middle-aged females, and the elderly. Adult education activities are also more widely promoted in rural than in urban areas (Fuwa, 2001). While greater participation by women is also found in the United States, the trend toward greater participation by the elderly and the promotion of adult education in rural areas may be explained by differences in administration in adult education in the two countries. The Japanese government has been very active in promoting adult education and has established and partially subsidized adult education centers throughout the country (Fuwa, 2001). The wider availability of these centers may explain why older adults and those in rural areas participate more frequently, at least in programs offered by local adult education centers.

Of any characteristic, prior educational attainment is the best predictor of participation in adult education. The 2001 Adult Education and Lifelong Learning Survey

Lifelong learning in Japan has focused on reviewing the education system in order to create a life-long learning society that promotes the idea of learning at all stages of life.



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demonstrated that in the United States, overall participation rates increased with educational attainment. Of those who had not completed high school, 22 percent participated in educational activities, whereas the participation rate was 58 percent for those with some college education and 66 percent for those with a bachelor's degree or more (Kim et al., 2004).

The correlation between prior educational attainment and increased participation in adult education is also found in Japan. A survey commissioned by the Japanese Ministry of Education, Culture, Sports, Science, and Technology, comparing the educational participation of older adults in six countries including Japan, found a high positive correlation between prior educational attainment and subsequent participation among older adults in each country (Ohsako, 1998).

The reasons cited for participation in adult education vary tremendously. Job-related motives are the most commonly cited reason for participation, followed closely by personal development motives (Merriam and Caffarella, 1999; Lamb and Brady, 2005). This is the case in both the United States and Japan. In 2001, 30 percent of adults in the United States participated in work related courses while 21 percent participated in personal interest courses (Kim et al., 2004). Yamaguchi (1998) noted that a 1990 survey, commissioned by the Japanese National Institute for Educational Research, revealed that the promotion of vocational knowledge, skills, and techniques, and the promotion of happiness, health and friendship were cited most frequently as the type of learning activities preferred by Japanese adults. Yamaguchi also found that preference for activities varied by age and sex. Younger adults exhibited a greater preference for vocational training activities, while older adults preferred personal development activities such as hobbies and cultural activities. Women exhibited a greater preference for personal development activities, while men tended to prefer vocational activities (Yamaguchi, 1998).

Just as there are commonly cited reasons for participation, there are also commonly cited reasons for nonparticipation. Barriers to participation can be external or "situational," meaning they are outside the control of the individual, or they can be internal or "dispositional," meaning they reflect individual attitudes (Johnstone and Rivera, 1965 as cited in Merriam and Caffarella, 1999). External or situational barriers, especially the lack of time and lack of money, are the most commonly cited reasons for nonparticipation in the United States (Merriam and Caffarella, 1999). These reasons are also cited by Japanese adults as factors preventing participation. In both the International Comparison of Learning and Social Participation by the Elderly survey and the Comprehensive Study on Educational Planning of Lifelong Learning Society, Japanese adults cited a lack of time as the main reason for nonparticipation (Ohsako, 1998; Yamaguchi, 1998).

Although external barriers such as lack of transportation or lack of information about available programs can limit the participation of older adults, this group often cites internal or dispositional barriers to participation (Merriam and Caffarella, 1999). Poor health, fear of being out at night, and lack of interest limit the participation of older Americans (Merriam and Brockett, 1997). Many of these factors were also cited by Japanese elderly. Location, lack of information, lack of interest and poor health are the main factors contributing to nonparticipation among this group (Ohsako 1998; Yamaguchi, 1998).

Much of the research on barriers to participation focuses on individual motivation, attitudes and beliefs as the main factors leading to nonparticipation. However, this focus



ignores structural barriers that limit participation, especially for older adults. One's ability to access learning opportunities is shaped by "framework conditions." These conditions include the values and attitudes of the social groups to which individuals belong as well as the economic structure of society and the features of the educational system itself (Cropley, 1989 as cited in Merriam and Brockett, 1997, p. 188). These framework conditions restrict the choices available to certain categories of people and open up choices for other categories. It is especially important to consider how structural barriers limit the participation of older adults.

### Impact of Educational Attainment on the Social Status of Older Adults

Modernization theory posits an inverse relationship between the level of societal modernization and the social status and conditions of the elderly (Cowgill, 1986, p. 188). Cowgill (1986) defines modernization as:

The transformation of a total society from a relatively rural way of life based on animate power, limited technology, relatively undifferentiated institutions, parochial and traditional outlook and values, toward a predominately urban way of life, based on inanimate sources of power, highly differentiated institutions, matched by segmented individual roles, and a cosmopolitan outlook which emphasizes efficiency and progress (p. 185-86).

The process of modernization often creates structural barriers, especially economic and attitudinal barriers, that undermine the status of older adults, including limiting participation opportunities in education.

Advances in health and economic technology, urbanization and education are the most significant dimensions of modernization that reduce the status of the elderly. Improvements in health technology, such as public sanitation and medicine, increase life expectancy and thus the number of people living into old age. Scientific advances—the development of new products, services and occupations—result in significant changes in the economy, often rendering obsolete the skills and the knowledge of older workers. Increased productivity resulting from new technologies and the increase in the number of available workers creates competition for jobs (Cowgill, 1986). Age based retirement emerges as a remedy.

Increased urbanization also accompanies modernization, caused in large part by the massive migration to burgeoning cities of young adults in search of better jobs. This relocation dissolves the extended family and creates social distance between the generations, complicating the provision of intergenerational support (Cowgill, 1986). Modernization also requires and promotes literacy and education for younger generations. As they acquire more education than their elders and enter a modernized economy, they begin to occupy higher-status positions. Intellectual and moral differences emerge between the generations, and the older generation begins to experience reduced status and influence (Cowgill, 1974, as cited in Hooyman and Kiyak, 2005).

The result, then, is an economic structure and educational system that favor the young and disadvantage the old by restricting older adults' opportunities. These changes reflect a social system that values youth over age. Older adults are considered irrelevant to production and are pushed out of the labor force by societally institutionalized retirement. Technological developments and a youth-oriented education system leave older people with outmoded skills and fewer skill development or retraining opportunities.

Younger adults exhibited a greater preference for vocational training activities, while older adults preferred personal development activities...

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Yamazaki (1994) provides evidence, describing how modernization isolated the older generation and diminished older Japanese adults' social status.

In the process of Japan's modernization, the close relationship with the young was gradually stripped away from the elderly. The role of transmitting culture was taken over by schools and the wisdom of the elders came to be perceived as outdated and was actively avoided. Thus, the elderly gradually lost their social status (p. 455).

Social exchange theory describes how these limited opportunity structures prevent older people from maintaining and updating their skills. The basic assumptions of social exchange theory, as described by Dowd (1980) are: (a) the organization of society reflects the interests of the dominant group, (b) the dominant group attempts to maintain the institutional arrangements that are most favorable to its interests, and (c) the legitimacy of these arrangements is established through socialization, but because socialization is limited in scope and never totally effective the legitimacy given to existing arrangements may be withdrawn (p. 19). That is, societal values and beliefs enhance the power and prestige of a particular group. The dominant group perpetuates values and beliefs that preserve the status quo, thus protecting its interests. Over time in both Japan and America, what power older people had has been gradually stripped from them, making them even less able to be effective agents in increasingly ageist societies.

The possession or lack of resources determines one's experience of everyday life. Dowd (1980) elaborated upon the relationship between age and the possession/utilization of resources. Since possession of desirable resources allows one to remain independent, a decline in resources will negatively impact one's autonomy. Dowd noted five types of resources. Personal characteristics are resources such as strength, beauty, charm, integrity, courage, intelligence and knowledge. Material possessions include monetary or property resources. Relational characteristics are resources that take the form of influential friends or relatives. Authority as a resource is derived from a political position or a position within a formal organization or from another status within a group. Generalized reinforcers are resources such as respect, approval recognition, or support that reinforce one's status (Dowd, 1980, p. 38).

Access to these various types of resources declines with age. For example, diminished strength and physical appearance lead to diminished amounts of relational and personal characteristics, while the deaths of close friends and relatives lead to decreased relational power. Outmoded skills lead to social and economic dependency and prevent older adults from developing exchangeable resources. Because the individual with more resources usually dictates the terms of exchange, diminished resources place the older individual in a weaker negotiating position. This imbalance will persist or even widen, given the nature of exchange and power relations, and over time can come to be viewed as a natural result of aging. Eventually this imbalance creates an image of elderly inability and dependency.

Left with few resources to exchange for more favorable treatment or status, older adults are forced to accept these limitations and withdraw from social life. Some choose age segregation to minimize the costs of unequal exchange. When interactions are limited to age peers, the likelihood of unequal exchange is decreased, since individuals of similar ages often share similar interests and resources (Dowd, 1980).

The disadvantaged person's or group's supply of power resources has to be increased before unequal exchange relationships can be challenged. If withdrawal and isolation result

from unequal exchange processes, but if increases in educational participation promote increased social status, greater emphasis on lifelong learning has the potential to maintain older adults' activity levels and provide necessary resources for improving their image and status in society.

### Lifelong Learning Efforts in Japan

The formal promotion of lifelong learning has enjoyed greater success in Japan. At the highest levels, the Japanese government is working to reform the existing educational system to provide learning opportunities at all stages of life. Lifelong learning is one avenue for meeting the societal challenges of a rapidly aging population. As popular interest in older adult education has grown, the diversity of learning opportunities available for older adults has expanded as well. Three specific types of educational opportunities exist for older adults in Japan. Education *for* the elderly includes programs directed toward the elderly and their specific educational needs. Education *about* the elderly includes educating youth about aging and older adults. Education *by* the elderly involves older persons assuming the role of educator so as to share their knowledge and experience with younger generations (Yamazaki, 1994, p. 453). Different programs have been developed to address each of these areas.

Education for the elderly is often provided through community education centers or *kominkan*. During the 1970s Japan funded local governments to establish *kominkan* in their communities. The government currently sponsors a number of programs that aim to promote continuing education among older adults. Three of the largest programs are: Senior Citizens' Colleges, which offer courses on health and recreation; The Silver Audit System, which allows senior citizens to audit college courses at local colleges, and; The Senior Citizens' Continuing Education Program, which offers a variety of courses through the local *kominkan* (Nojima, 1994). This last program offers courses on lifestyle patterns, mental and physical health, issues of importance in Japanese society, hobbies and traditional arts, and community activism and social skills (Nojima, 1994). These courses are offered with the belief and hope that elders will take what they learn and apply it within their own communities.

Other examples of education for the elderly programs are ELNET (Educators' Learning Network) Open College and the University of the Air. The both attempt to bring lifelong learning to a wider audience. ELNET uses satellite communications to transmit open lectures from universities and other institutions to citizens' public halls and other locations nationwide (Ministry of Education, Culture, Sports, Science, and Technology, 2005c). The University of the Air (UAJ), established in 1983, is a four-year university that offers all of its courses via television, radio and other media to bring learning opportunities to a wider range of Japanese (Ministry of Education, Culture, Sports, Science, and Technology, 2005d). The mission of the UAJ includes providing a flexible route to a college education for those who may have discontinued or never had this opportunity, such as the working class, women and the elderly (Iwanaga, 1994). The UAJ allows older persons to access the university system without encountering the entrance exam system, and the use of telecourses allows older students to complete their studies at their own pace (Iwanaga, 1994). The University of the Air is also a less expensive alternative for those on a limited income.

Education about the elderly and education by the elderly have been sponsored by the

Over time in both Japan and America, what power older people had has been gradually stripped from them, making them even less able to be effective agents in increasingly ageist societies.

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Ministry of Education at elementary and secondary schools to raise awareness of the impact of the aging population on Japanese society. The phenomenon whereby the older population grows faster than the younger population is known as *koreika* (Makino, 1994). *Koreika* draws attention to the importance and necessity of providing older adults with opportunities for more active engagement in society. Ensuring intergenerational relationships has been identified as one way to achieve this end (Yamazaki, 1994). Specific efforts to establish or renew such relationships have involved educating school age children about the factors contributing to the expansion of the aging population and introducing to them the necessity of expanding the existing social welfare system to offer support to this generation (Nakamura, 1994). Inviting older adults to visit schools and participate in special events, such as cultural festivals, and asking older adults to serve as educators, sharing their knowledge of cultural practices and other skills, are also common practices used to promote intergenerational interaction. In addition, the Ministry of Education has actively encouraged schools to provide more opportunities for students to participate in volunteer activities that include social contact with the aged. It has even been suggested that students' volunteer activities be reviewed as part of the university admissions process in order to encourage greater participation in these programs (Nakamura, 1994).

### Lifelong Learning Efforts in the United States

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Unlike Japan, the United States has no formal government policy to promote lifelong education. However, there are some notable government actions that have contributed to the growth of educational programs for older adults. In 1971, the White House Conference on Aging recognized the potential benefits of expanding educational opportunities for seniors; subsequently the 1973 amendments to the Older Americans Act encouraged senior centers to include education as part of their mission (Manheimer and Moskow-McKenzie, 1995). But little else has been initiated by the federal government to promote lifelong learning. Little federal money has been directly appropriated for educational programs for seniors; the promotion of older adult education still remains a locally supported endeavor.

Even without government involvement, the growing number of older Americans has led to a growth in demand for and establishment of educational programs targeted at older adults. According to Manheimer and Moskow-McKenzie (1995), there are five organizational models of older adult education programs that serve seniors at the local level. Many of these organizations work to empower seniors by allowing them to play leadership roles as teachers, administrators and planners. College and university-based Lifelong Learning Institutes (LLIs) offer members the opportunity to engage in educational activities that are designed, coordinated and taught by other institute members. Older Adult Services and Information Systems (OASIS) offer programs in the arts and humanities, health promotion and volunteer activities. Shepard's Centers is a network of interfaith community-based organizations that provide opportunities for older adults to engage in meaningful learning activities. Community colleges offer special courses for seniors at little or no cost. Senior centers offer a wide range of educational programs for older adults (Manheimer and Moskow-McKenzie, 1995).

The North Carolina Center for Creative Retirement found many of these programs were developed at the local level with the assistance of national networks or host organizations such as the Shepherd's Center network, and did not result from national legisla-

tion or public policy (Manheimer and Moskow-McKenzie, 1995). In fact, many of the programs were initiated by leaders within the host organization who saw a need for older adult education. Data also indicated that once the programs were established, being associated with a host organization added legitimacy and prestige to the program (Manheimer and Moskow-McKenzie, 1995). These findings corroborate Knowles' finding that throughout the history of adult education in America, formal adult education programs "tend to survive to the extent that they become attached to agencies established for other purposes" (Knowles, 1977 as cited in Merriam and Brockett, 1997, p. 109).

Another program offering older adults the opportunity to engage in lifelong learning is Elderhostel. This program utilizes space and faculty available at colleges and universities during the summer months to offer noncredit courses on diverse topics, allowing older adults to continue to employ their intellectual and creative abilities (Hickson and Housley, 1997). Elderhostel offers nearly 8,000 programs annually in more than 90 countries to almost 170,000 older adults each year (Elderhostel, 2005). (This program was not included in the above discussion because is not a strictly local program and because it does not involve participants in curriculum and program planning [Manheimer and Moskow-McKenzie, 1995].)

Inviting older adults to visit schools and participate in special events and asking older adults to serve as educators are also common practices used to promote intergenerational interaction.

## Discussion and Conclusions

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Based on the histories, programs and data above, it appears the focus on lifelong learning in Japan has served to expand educational opportunities for older adults. The promotion of lifelong learning policies on a national level has raised awareness of the importance of older adult education. While various education opportunities are available to older Americans, the U.S. has no nationally recognized policy regarding lifelong learning. To survive and gain legitimacy, many adult education programs in America have had to attach themselves to other institutions or programs that are not specifically focused on adult education. Both America and its elderly might well benefit from the development of a coordinated national policy similar to Japan's. Such a policy would raise awareness of the need for promoting further educational development among older adults, provide older adults with even greater opportunities for accessing educational opportunities that can assist them in developing new skills and resources, and provide evidence of a belief in the symbiosis of intergenerational relations.

But there are problems that can hinder the expansion of lifelong learning programs for older adults. Access is a major concern for ethnic minorities, individuals in lower socioeconomic classes, and the disabled in both the United States and Japan. In America, minority adults are disproportionately unemployed, earn lower incomes, and are less educated (Merriam and Caffarella, 1999, p. 5). Data reviewed above indicate that adult education participants tend to be employed full-time, middle-class and above, and have higher levels of educational attainment, and few programs for older adults in this country use creative or aggressive measures for recruiting minorities (Manheimer and Moskow-McKenzie, 1995).

The Japanese have also had difficulty integrating minorities and members of the lower classes into the educational system. For example, the Buraku people are a socially segregated group in Japan with a high illiteracy rate (Yamaguchi, 1998). Relying on self-selection for adult education participation will likely only widen the educational gap. Both countries need aggressive policies to integrate marginalized groups into lifelong learning pursuits.

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Inadequate facilities can also inhibit the pursuit of lifelong learning. Older persons often cite lack of transportation and limited mobility as barriers to participation. Facilities used for older adult education must be accessible for those with limited mobility or other disabilities. While transporting older learners adds significantly to the cost of adult education programs, especially in rural areas, including transportation as an element of the educational program may well increase older adult participation in lifelong learning.

Facilities must not only be accessible; they must also be able to accommodate participants once they enter the learning environment. Older adults often have diminished visual and aural capacities and may tire more easily or experience more learning-related health problems than younger adults. These conditions can affect the performance of older adults in the learning environment, and those who plan and deliver lifelong learning activities must understand this and adjust the learning environment accordingly. Program staff with formal education/training in gerontology and adult education will be an advantage.

The growth of older adult educational programs in the United States has been sporadic, apparently largely due to there being no coordinated national effort to promote lifelong learning. In Japan, efforts to promote lifelong learning have been more concerted and have received greater government support. This difference in approach to educational policy is at least in part explained by cultural differences between the two countries.

Japanese society tends to recognize, value, and respond to group concerns over individual ones. This contrasts sharply with the American emphasis on individuality. These differing cultural values are reflected in the level and nature of the approaches to policy formation in the two countries. The United States has taken a more decentralized approach, essentially allowing each state to develop its own adult education policies and programs, while the Japanese have taken a more centralized approach and developed more inclusive policies that extend standardized lifelong learning opportunities to the entire populace. This concerted effort to promote lifelong learning opportunities in Japan has helped maintain the status of the elderly against the ravages of modernization by providing them with opportunities to learn new, salient skills and develop new roles and resources. In doing so, older adults increase their resource base and become more powerful actors in social exchange situations.

With the older population exploding or poised to explode in nearly every nation, the roles and statuses available to the elderly become more important, not just to the growing number of older persons, but to the society in which they live and, to a greater or lesser degree, function and contribute. Without conscious intervention, however, modernization threatens the quality of life for the elderly in their families, communities and societies. Education is a powerful means to acquire the necessary resources (i.e., relevant knowledge and skills) to maintain social status and to negotiate favorable terms in social exchanges, both individually and as a cohort.

As noted, cultural differences between Japan and America preclude either nation adopting the other's policies and programs wholesale. Nonetheless, the more coordinated and apparently more positive response in Japan shows that empowerment through education is achievable, even (and especially) for older people. Demographically Japan is the world's oldest country. America would do well to use it as a crystal ball, a glimpse into the future, and to learn from Japan's experiences, adopting the positive and adapting it to America's own values. In five years American Baby Boomers begin turning 65. It is a highly educated generation, one that will likely want to continue active engage-



ment in society and one that is open to lifelong education more than any previous cohort of Americans. For the elderly, both at home and abroad, emphasis on and development of lifelong learning has the potential to oppose the negative consequences of modernization and maintain or increase the resources needed to combat the isolation and segregation that all too often plagues older adults, diminishing not only their enjoyment of life and their place in society, but also society's opportunity to benefit from the contributions they are still able and willing to make.

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**Ed Rosenberg** received his B.A. in communication arts from Michigan State University and his M.A. and Ph.D. in sociology from the University of Southern California. He developed and administered undergraduate gerontology programs at Western Washington University, the University of Pittsburgh-Bradford, and RaRoche College. Since 1991 he has been a member of the Department of Sociology and Social Work at Appalachian State University, where he is professor of sociology and, since 2000, director of graduate programs in gerontology. His specialization is "wherever my students' interests take us." He lives in Blowing Rock, North Carolina, with his wife and two sons.

## Mr. Allen Gets a Taste of Gardening

**Marjorie McNamara**

You can't eat flowers:  
Why grow them?  
I cram them down, my mouth full of nasturtiums.  
Here, they taste like radishes.

You grow roses.  
Only for my wife, he says.  
And I pick the petals of a red rose winner, 1994.  
They are cinnamon-flavored—try them on French toast.

I look across at his beans, loomed like a Navajo rug.  
Ironed flat.  
And I begin to pick.  
Field peas, English peas, butter beans, limas, and crowders.

What, you've picked peas for thirty years and never eaten one raw?  
I crunch each between my teeth.  
He takes one from my fingers.  
I was brought up in an orphanage, he says.  
And things take over.  
The flowers start to move in slurries of color.  
They call out their names.  
Can you still hear me? What's that?, he says.

My fingerprint becomes the flower-press of wind.  
Do I have one? he asks.  
Why not?  
Because stones wait in the soil.

Stones sing in riverbeds.  
Can we see pitches?  
Yes, open G makes the whole violin vibrate.  
He takes my hand.

The rain fiddles our fragrance.  
Color-spilled, we sit down in the red dirt.  
Carnations, gardenias, angelica.  
We eat flowers.

**Marjorie McNamara** went back to school after raising nine children, graduating Phi Kappa Phi in 2004 with an M.A. in English/creative writing from North Carolina State University. She helped to edit *Earth and Soul: An Anthology of Southern Poetry* and writes interviews and fiction for her hometown *Alamance Magazine*. Her poems have appeared in *The Independent* and in *Poetry of the Golden Generation: A Celebration of Southern Poets 50 Years of Age and Older*.

## Life Stories, Autobiography, and Personal Narratives

**Robert Atkinson**

Storytelling is ubiquitous to life. We think in story form, speak in story form, and bring meaning to our lives through story. With this inaugural issue of *The LLI Review*, we are creating a regular section of the journal to feature the reflective reminiscences of lifelong learners. We want to highlight not only the rich and moving life stories, autobiographies, personal journals, and brief memoirs themselves, but to illustrate the power and truth that such narratives carry as learning tools for both authors and readers. The personal stories we tell help us make sense of our experience and convey what matters most to us. As we construct and reconstruct a sense of self in our life stories, we are brought back to our roots and given direction at the same time; value is restored to our lives, and our own experience is validated. Our stories are also both personal and social at the same time, as it is through our stories that we create connections and build community.

We live in a time when people everywhere have recognized the value of telling the stories of their lives to friends and strangers alike. We are finding that putting our life's events into the form of a story can help us bear a burden or see with a clearer perspective. We experience firsthand the power of stories when we tap into ageless, universal themes that become deeply familiar to us through the telling of our stories. When *The New York Times* reported, in a full page article on February 9, 2000, that "thousands" of groups of lifelong learners across the country "are getting together to look back at their lives and share their stories," we knew that this narrative turn was in full swing. The article highlighted the workshop led by Professor Thomas R. Cole in Galveston, Texas, with a dozen older learners who wrote and read their life stories to each other. He says he was inspired by the work of James E. Birren, a leading gerontologist who teaches guided autobiography at UCLA.

This inaugural issue features the brief autobiography of James E. Birren, written in the form that he has led hundreds of groups through over the past 30 years in several countries. When I invited him to contribute his autobiography to this journal he felt it would be most appropriate if he gathered together the “two pagers” he had written about his own life over the years while conducting the Guided Autobiography workshops he developed. As you will read here, his life has unfolded in remarkable ways, from peddling handbills in high school to leasing a gasoline station at age 20 to becoming a psychologist at the National Institutes of Health, to becoming known as “the father of gerontology” for his ecological or integrative approach to aging, to his pioneering work in guided autobiography. He is associate director of the UCLA Center on Aging, and professor emeritus of gerontology and psychology at the University of Southern California, and has more than 250 publications in academic journals and books, and many awards in the field of gerontology.

This issue also features the life story of Abe Arkoff. I had the distinct pleasure of listening to his story firsthand in his office at the University of Hawaii, where he is professor emeritus of psychology. He continues to teach there in the Osher Lifelong Learning Institute. It was easy for me to see why he is the recipient of two awards for excellence in teaching, and, with his humility and sincere interest in the lives of others, how he has elicited the stories of hundreds of adults through his *The Illuminated Life* program of courses and workshops. This life story is a transcript of that interview, with his written revisions of that transcript, touching on what he considers the important aspects of his life growing up in Iowa during the 1920s, going in to the field of psychology, and at midlife transforming his focus to a direction that “made all the difference in the world.”

Rick Moody said in that *New York Times* article, “We’ve democratized autobiography. It’s no longer just for the rich and famous, for people with distinguished lives.” Everyone has a need to search for meaning in their lives, to find their voice, to speak their truth, to leave a record; everyone has a life story others will learn from and appreciate.

One of the many things I have learned from the more than 1,000 life stories I’ve read that my students and I have undertaken during the more than 30 years I have been working with them is that the stories we tell of our lives are those we want others to know and remember about us. In other words, we tell the story about ourselves that we want to leave as our legacy. The story we tell about our lives is one of the most important things we will ever give to others. It is therefore crucial that we tell it exactly the way we want it to be told.

This regular section of *The LLI Review* will allow us, Mike Brady and me, to draw upon our common interests in learning through life storytelling, autobiography, and journaling to feature the personal stories of older learners throughout the OLLI network. It will also become a collection of personal legacies, complementing the Center for the Study of Lives archive on the OLLI National Resource Center’s Web site.

...the stories we tell  
of our lives are those  
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about us.

## How Do I Think I Got Here?

**James E. Birren**



*James E. Birren*

When I think of the pathway of my life, I am amazed by the twist and turns and the role that chance played. I have had appointments at two universities, served at the National Institutes of Health, and during World War II I was a commissioned officer at the Naval Medical Research Center in Bethesda, Maryland, and I have lectured in 40 states and 27 countries. This path would not have been predicted when I was in high school and peddled handbills for \$2 a day, nor at age 20 when I leased a gasoline station with two friends my age and sold gas for 15 cents a gallon and paid ourselves 27½ cents an hour. How did I get from there to here?

When I was born in a small hospital on the north side of Chicago, there was an accident. After my mother delivered me, the doctor placed me on a table next to my mother and asked the nurse for an umbilical clip. She didn't have one and the doctor got angry and told her he would have done better with the charwoman. He left the room in anger to get a clip and the nurse went out in the other direction to get a clip, leaving my mother and me alone. During the interval my mother expelled the placenta and it fell to the floor dragging me with it. When the doctor and nurse returned they were startled to see me as a purple mess on the floor. Years later my mother told me she would never forget the look on the doctor's face when he came back in the room and saw me on the floor.

When I was in college I needed a birth certificate and went to the registry at the City Hall in Chicago, but they did not have one for me. I have assumed that the doctor thought I was not going to survive and didn't register my birth. The registry had me fill out a form and told me to take it to my birth doctor to be signed. His receptionist took it into him for signing and he did not see me. Later when I got a copy of my birth certificate I saw my handwriting—I am unusual in that my birth certificate is in my own handwriting. Now I feel that the title of my autobiography should be "I had to do it myself."

My mother and father had minimal schooling, my mother five years and my father eight years. My father worked six days a week, leaving home in the morning before my brother and I had breakfast and went off to school. My father worked in the laundry business, which was then busy, before home washing machines were developed. He nudged me and my brother to work and take money seriously.



When I was six years old my father developed a plan to teach my brother and me how to make and save money. Alternating each week, one of us would buy a carton of cigarettes for \$1.25 at the local drugstore and sell the packs to my father for 15 cents each. That meant we made 25 cents a carton during our week to buy and sell them. My father died of lung cancer at age 72 but his economic teaching has had a lasting effect on me.

My father's parents came to Chicago from Luxembourg about 1890 and my mother's parents arrived from Germany about the same time. The two families had very different orientations in the philosophy of life but both were committed to hard work. My father's family was Roman Catholic. In the house my paternal carpenter grandfather built, each room had a crucifix on the wall. In my mother's parents' home there were no religious objects but there were many contemporary books and magazines that caught my brother's and my attention. Her father said when he came to America only English would be spoken in the house. In contrast, those in the other grandparents' home often spoke the Luxembourg, a dialect I never learned. That grandmother did very well in feeding us grandchildren, but I don't remember any conversation with her. I doubt if she learned English. The other grandmother took my mother and my brother and me to one of the earliest sound movies that was released in Chicago. Here was a big difference in the families; one explored the new and the other was very traditional.

In a sense my father was more oriented to my mother's family. He was exploratory and very anti-superstitious. However, to marry my mother in the Catholic Church he had to have her commit to becoming Catholic and to raise any children in that faith. My father encouraged my interest in going to school. I still have a *Handbook of Chemistry and Physics* he bought when he was an adult. With only eight years of schooling that was an unusual purchase. In high school I expected to become an engineer and therefore took all the required college prep courses but also all the technical shop courses plus four years of mechanical drawing. When I finished high school the question arose, should I go to the local junior college. "Why not?" my father said. So I did and took two more years that were oriented toward becoming a mechanical engineer. When I completed these two years in 1938, the economic depression was still having its effect on Chicago, and engineers were not getting jobs. I decided to go to the Chicago Teachers College to get my bachelor's degree and the certificate needed to teach. That worked out well and while I was there as a student a professor who taught the course in the psychology of reading asked me why I didn't go on to graduate school in psychology.

I had saved about \$400 from my work at the gas station and thought that going to Northwestern University as a graduate student in psychology was a good next step, it fitted in with idea of teaching and testing. But was I surprised. After I entered graduate school in 1941, war was on the horizon. My professor, Robert Seashore, received a war-related research project co-directed by the chairman of the physiology department at the medical school. It was thought that the German General Rommel provided his troops with amphetamines to keep them moving in pursuit of the British troops across northern Africa. The war project required my professor, and two other graduate students and me to go to the local army base, Fort Sheridan, and provide a placebo, amphetamine, or caffeine to infantry troops who would stay on duty and awake for 24 hours. We would measure them on several psychomotor tests before and after the period of continuous wakefulness. The tests involved reaction time, hand tremor, and complex visual discriminations. After Fort Sheridan we were sent to Fort Knox, Kentucky,

Here was a big difference in the families; one explored the new and the other was very traditional.

## How Do I Think I Got Here?

where we kept tank drivers awake for 24 hours and driving for long periods with stimulants or placebos and seeing what the effects were.

The next assignment was even more startling. We were sent to the southern California Mohave Desert. There, vast numbers of troops were organized in tents and marched in the heat to condition them for assignment to Africa and pursuit of the German army. There was no air conditioning except in a temporary hospital in a metal shed-like building that was used for accidents and for treating heat exhaustion. My professor and the three of us graduate students slept in a tent and had water bags hanging on the tent poles for drinking.

The results of the project did show that amphetamines kept the troops awake and alert. However, time went on. General Rommel took his troops out of Africa and moved them to Europe where the war was then focused. The project was halted, then the question of my military service arose. The physiologist head of the project, Dr. Andrew Ivy, became the scientific director of the Naval Medical Research Institute in Bethesda, Maryland. He told me I should go to medical school or go into the Navy. I chose the Navy and I was assigned as an ensign to the Naval Medical Research Institute. As a junior officer, I was assigned to many tasks, all war related, from the effects of high temperature on performance of Navy personnel on board ship, to seasickness.

Seasickness was becoming a major problem because large numbers of Army men were being transported in landing crafts and getting seasick. Going across long distances at sea resulted in men getting sick and requiring hospitalization. One thing became clear, seasickness was part of a broader sensitivity to motion; motion sickness was a more general phenomenon. I developed a questionnaire that asked about response to all forms of motion, e.g., swings, roller coasters rides, Ferris wheels, and cars. This became part of my doctoral dissertation when I returned to Northwestern University to finish my Ph.D. in 1946-47. About 30 years later I received a request for the questionnaire from personnel responsible for the beginning of space flights. The men in space without gravity to orient then were getting motion sick.

While I was in the Navy I met Dr. Nathan Shock who visited my director at the Naval Medical Research Institute. Nathan Shock was a physiologist who was assigned to develop the first gerontology research unit within the U.S. Public Health Service. It was to be located in Baltimore and he was looking for research personnel and he thought I would fit into the pioneering gerontology unit. He told me that after my year of completing my dissertation I could join his unit, which I did in 1947. Gerontology was then just emerging as a field of study and I attended the first meeting of the Gerontological Society held in New York in 1948.

For three years I did research in Baltimore on young and older subjects trying to describe the differences and their significance. My research ranged from visual dark adaptation, to intelligence, to speed of behavior. This led me to transfer to the National Institute of Mental Health (NIMH) which was just beginning to plan for an in-house research program at the Bethesda site. There I started the Section on Aging that took a multidisciplinary view of aging and the personnel did both human and rat studies. One thing I discovered were some of the out-of-date paradigms that dominated interpretations of research.

After World War II, attention to chronic diseases was rising. Unlike the infectious diseases, the host plays a major role in chronic diseases, such as cardiovascular disease, cancer, and diabetes. This means focusing on internal rather than on external factors,

but that also had limitations in perspective. At the National Institute of Mental Health, a multidisciplinary team studied a group of community resident older men. One of the findings was that psychosocial loss was related to physiological well-being. This aroused tension in the group and the publication of the monograph based on the research was delayed for a year because there was an underlying question of whether psychological or social factors could affect the physiological well-being of an individual. This issue was resolved and the monograph was published.

Several other instances of out-of-date or limited concepts of the human organism and its well-being arose. Robert N. Butler and I proposed that the NIMH create a multidisciplinary laboratory for the study of aging in 1963. It was turned down by the directors of the Institute presumably because of the dominance of the then-current psychoanalytic view that the important elements of the organization of the human being were laid down in early childhood with adult life presumably following the early causal dictates.

In 1964 I moved into the National Institute of Child Health and Human Development (NICHD) to organize both the intramural and the extramural research programs on aging. There are two startling interactions that I recall. One was that the pediatrician who headed the child research program said that in pediatrics the upper age limit for patients was age 18. With this in mind he suggested that my responsibility was for research on persons over the age of 18! He showed me some infant pictures of identical twin boys who were different in size, height, and weight. Next he showed me a photo of the mother's placenta with graphic evidence that the area of the placenta serving the smallest boy was the smallest. Obviously our individual characteristics begin *in utero*. How much influences are on the fetus and their importance in later life health and behavioral outcomes is now an open question. Obviously even identical twins are not identical people.

Another dated paradigm came to my attention when the director of the NICHD asked me to comment on a longitudinal research project on heart disease. Because of my earlier experience in the NIMH with psychosocial factors influencing later life physiology, I suggested that some social-behavioral variables be included. These suggested variables were rejected. Presumably their model of heart disease was that it was an organ-specific phenomenon and remote environmental conditions did not influence it.

These experiences led me to think more broadly about the role of the nervous system in health and well-being of individuals. Clearly the nervous system is the primary regulatory organ of the body. It regulates metabolism, body temperature, blood pressure, temperature, and other important physiological functions. But also, it modifies its functions on the basis of experience. That is, it is the organ system of the body that primarily learns from experience.

These thoughts led me to reread some early papers that I received from the NIH library on a major national health survey that was supported by the Works Project Administration, 1935-37. It studied thousands of persons in both urban and rural areas of the country and found differences in the health of urban and rural black populations. Across the top of my copies was written "not for publication." My interpretation was that medicine and politics of the day were not ready to accept that social variables influence the health of populations and that publication of the findings would be strongly contested. Today we are much more open to ideas and evidence that social and environmental conditions influence mortality and morbidity in the population.

Today we are much more open to ideas and evidence that social and environmental conditions influence mortality and morbidity in the population.

## How Do I Think I Got Here?

I have become tentative about many interpretations because of exposure to developments in science. A notable example is the early notion that the number of neurons was fixed in early development and there was no increase in adult life. Current views are more optimistic that neurons can multiply in the mature nervous system depending upon their use. How much the principle of “use it or lose it” applies to the integrity of the aging nervous system is still a question for further research to answer.

The retirement of commercial airline pilots came up for discussion in 1958 and I was asked to participate in a meeting conducted by the head of the Federal Aviation Agency. At that time there was no upper age limit for pilots and there was some worry that an older pilot might have a heart attack or stroke in flight which could lead to a public disaster. As I recall there were 17 cockpit deaths in the previous year. The group decided that age 60 was reasonable retirement age to adopt for pilots. I added the idea at the meeting that in subsequent years the retirement age should be moved up or down depending upon what future research evidence provided. My suggestion implied flexibility in regulations and modification in the light of emerging evidence. That didn't happen.

The Airline Pilots Association comprised of senior pilots (captains), was strongly against age 60 retirement and attempted to sue the government and bring to court the committee that adopted the age 60 rule. The suit was denied but the pilot association spent considerable money in their legal approach and had to broaden their membership to include the second level pilots who were younger. Because they were younger, they rather liked the idea of age 60 retirement for their seniors, and because of their membership the association changed its direction from being against the age 60 rule to being in favor of it. Because pension costs rise with time of service the airlines began to favor more strongly the age 60 rule. Thus the regulation that was adopted to protect the public became rigid without regard to increase evidence about the validity or reasonableness of the age 60 retirement rule.

Advancements in measurements all added up to being able to assess an individual pilot's health and skills without the dependence upon chronological age as the sole indicator of the likelihood of flight mishaps. The age 60 retirement rule has remained fixed in place, not because of its validity but because of economic and social influences. Actually there is some suspicion that younger pilots may be slightly more prone to inflight mishaps because of their tendency to be more impulsive, or to act and not think about the details of the situation in which they were in. This example also points out for me the lag effects in rules and regulations in relation to emerging evidence.

In 1964 I was invited by the University of Southern California (USC) to start a center for research and education related to aging. Retirement communities were just starting up and opportunities for funding research on aging were opening. I accepted the position but I must admit that I had an out-of-date paradigm in relation to retirement and housing. I had a stereotyped view that retirement communities were “age ghettos,” and did not serve their residents well. My colleagues at USC carried out research that showed that residents in retirement communities were far more satisfied with their lives than were community residents of the same age. I discovered that my views of later life were out of date and that I needed to learn more.

On a visit to Japan I met a biologist, Akira Koisumi, who further expanded my thinking about the relative importance of environmental variables in the length and quality of life. He pointed out that the genetic background of humans is always expressed in a specific environment and that the environment modulates the expression

of our genetic inheritance. Some time ago this would have been dismissed as unrealistic thinking, that obviously our genetic backgrounds as a species and as individuals have a relatively fixed control of the outcomes of our lives. Then I began to think about the dramatic changes that had occurred in the average life expectancy of humans. For example, in America from 1900 to 2000, more years were added to the average length of life than were added from Roman days to 1900. Life expectancy in that century increased in America from about 47 years to 77 years. Obviously this could not be attributed to genetic changes but must have been the outcome of environmental changes such as clean water, sewage disposal, reduction of nutritional deficiencies (transient and acute), and the rise of education that changed social practices and individual behavior.

My visits to Japan have opened my eyes to the high regard we have in America for new things. This relates not necessarily to ideas but for respect for old objects and nature. In America an old table showing the marks of much use can be discarded or regarded as a symbol of the past in relation to the present. Also, I had with a conversation with a man in Wales who was reacting to news of a hurricane that destroyed many homes in Florida. He said to me, "you don't seem to build your houses to last forever." I looked around at the homes in Wales and they were built of field stones with slate roofs. It would take extremely strong winds to blow away these three- and four-hundred year-old houses.

During my tenure at USC I had a sabbatical leave in 1979-80 that I spent at the Center for Advanced Study in the Behavioral Sciences at Stanford University. There was a weekly discussion group composed of a mixture of psychologists, psychiatrists, and sociologists who had much experience with research on behavior. One day a senior psychiatric researcher made the comment that during the discussions the psychologists always mentioned cognitive issues and the psychiatrists always mentioned emotions. This comment gave me insight into the focused nature of the different disciplines and to the gap in putting the individual together as an organism with varying levels of determinants of behavior and decisions.

If I place the changes of older people into this dynamic picture I find that I am presented with one of the most complex problems facing science in the 21st century. Explaining aging is a very complex task, but one that is important for our well-being as we seem to be approaching an "agequake" in which the increasing longevity of populations and lowering of birthrates is influencing institutions, cultures, and individuals as our models of life in the information age have become ambiguous.

What I am coming to recognize is that age doesn't explain anything. Age is a convenient index to gather and to group data. But age can index both positive and negative variables in relation to the particular phenomenon we are trying to explain. The famous Gompertz graph of the relation of mortality and age shows a relatively high mortality at birth with a decline toward age 10 and a steady acceleration through the remainder of life. The curve shows us that mortality increases in adult life but it doesn't suggest why. Other relationships between age and human functions can also be shown, but age in itself doesn't tell us causes. For me, I have to think about causal factors to replace age; it is a powerful and useful index but one that increasingly has to be replaced with causal variables.

During my period of research at the University of Southern California I found myself increasingly interested in topics that were outside conventional psychology. In my graduate seminar I introduced students to such topics as wisdom, creativity, and love

What I am coming to recognize is that age doesn't explain anything.

## How Do I Think I Got Here?

in relation to changes over the life span. That led me to my next change in perspective on aging, the thought that individual's interpretations of their lives influenced their outcome and their well-being.

I had to face what seemed a contradiction in my scientific orientation. On the one hand I was committed to evidence-based conclusions and on the other hand I was entering a "soft side" of science, the inside views people had of their lives. Psychology began in the nineteenth century and was based upon the credibility of a bottom up approach based on the successes of physics and chemistry in replacing out-of-date beliefs about natural phenomena. Psychology was started on a bottom up approach of experiments on elemental processes of perception and of learning and of memory. The term "psychophysics" emerged that referred to the relation of perceived stimulus strength in relation to the magnitude of the stimulus as in the increase in the loudness of a tone in relation to its physical strength. Not studied in the emerging phase of psychology as a science were top down issues of the influence of beliefs upon behavior and health.

During my tenure at USC we created the Andrew Norman Institute for Advanced Study in Gerontology and Geriatrics. It had weekly seminars that included guest speakers. On one occasion a distinguished physiologist presented a slide that showed the details and complexity of the control of the human heart. It impressed everyone and led to questions about the placement of the heart in relation to total bodily functions. The physiologist laughed and said his expectations were for an integrated science with a need for only one miracle. I commented upon the popular view of the heart as being symbolically the seat of love. I can not imagine positive public responses to a new Valentine's Day card that would have an image of a brain with the note "my frontal lobes have great love for you." This results for me in the conviction that we constantly have to change our belief-based decisions and views of life with evidence-based ones.

Later in my research career I became interested in the interpretations of life as revealed in autobiographies. I taught courses in autobiography in which the participants wrote their life stories and gave them to me to use anonymously in research. In this first phase of autobiographical study the focus was on meaning in life, how individuals attached meaning in their lives and their values. I am now seeking a pathway between decision making and interpretations of life. Individuals make decisions about their lives that influence their well-being and health. My basic hypothesis is that, "who I think I am influences the choices I make." The ancient Greeks interpreted behavior as resulting from the influences of gods and goddesses. People could be occupied by good influences or bad ones or by demons. Volition and decision choices were not regarded as potentials for the individual but as the result of forces of outside spirits.

When I think about the acceleration in the amount of information provided by research in recent years I have two responses. One is that we will understand more and be better able to provide for healthier, longer, and acceptable lives. The other view is that we have a growing gap between available information and its integration within the academic community and its use for public good. A past president of the American Physiological Society recently said that there are now 13,000,000 references on-line in physiology. The integration of information in the scientific community is a major task that has been neglected as we have searched for more specific pieces of the jigsaw puzzle of the organization of organisms and their development and aging.



I have learned from autobiography that humans are adaptable and it is quite likely that more attention will be given to integration of information from the viewpoints of science, society, and individuals. Autobiography represents a “soft area” for research, one that would not have been very respected in past years when the behavioral and social sciences were trying to emulate the advances in physics and chemistry. More recently, however, there is growing opinion that our interpretations of our lives influence the decisions we make. The self we tell ourselves we are, the narrative self, appears to influence what decisions we make in life. I had the opportunity to interview a leading psychoanalyst in Los Angeles when he turned 75. I asked him about his psychoanalytic theory and how it related to individuals. He said, “That is my theory, you have to realize that every person has a theory about his or her own life.” This seems to me a very integrative statement for my approach to autobiography; autobiography reveals the individual’s theory about himself or herself, how they explain their life. It leads to the idea that one’s self, the self we tell ourselves, is in a sense a personal theory, a theory that provides direction for decisions and actions in everyday life. Here lies a possible connection between the autobiographical stories of life and the decisions that individuals have made and the directions their lives have taken.

I have lectured in 40 states and 27 countries and have become impressed with the different views of life, with the impact of culture upon interpretations and of the impact of families and of religion. Increasing tension between different religious groups is the opposite of what I experienced in Japan. I became aware of the fact that melding of religious beliefs in Japan is not uncommon. This is one of the areas for autobiography to explore; the role that religion plays in the organization of the narrative self and of our individual theories of our lives. My commitment that has emerged is to encourage explorations of the inside of life and of the replacement of ancient beliefs with evidence.

How did I get to where I am? The answer lies in the wide range of things that I have explored in my career. It startles me. Some may question my lack of focus, although I certainly appreciate what chance and interactions with thoughtful colleagues have done for me. I have performed intellectual measurements on individuals of different ages, I have measured the conduction velocity of nerves of rats of different ages, I have studied the speed of reactions of persons of different ages, and I have looked into the study of the insides of lives through autobiography. I have published papers with physiologists, physicians, dentists, psychiatrists, psychologists, social workers, and philosophers. What has all this taught me? It has taught me that there is so very much to learn and also that I have so much to learn. I learned that there is no obvious end to replacing belief-based views with those based on evidence.

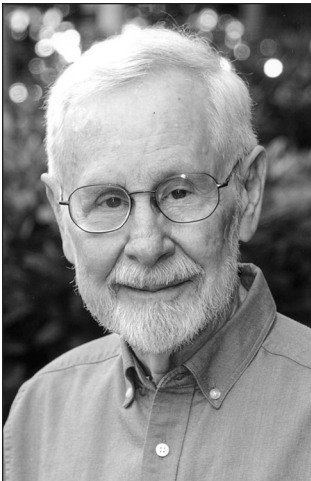
This has been a brief account of the twists and turns of my life, primarily of my work life. Not mentioned was the learning provided me by my wife Betty and our three children who nudged me to be more “human.”

What has all this taught me? It has taught me that there is so very much to learn and also that I have so much to learn.



## Lives—A Lively Livelihood

### Abe Arkoff



*Abe Arkoff*

**W**e were a family of seven, my father and mother, four boys and a girl. We lived in Fort Dodge, a small city in the northwest corner of Iowa. My father had emigrated from the part of Russia now called Belarus, and my mother grew up in Lithuania and Latvia. My father had a small men's clothing store and usually no employees, so he depended on the rest of us to help. He worked hard and long—six very long days a week and a half day on Sundays. It was quite a struggle, but he provided all we really needed.

I believe my mother found fulfillment and satisfaction in her life as a wife and mother, while my father found little in his occupation. He was a brilliant and religious man who would have been well-placed as a teacher or rabbi. I once made the mistake of telling a workshop group that, on this basis, I thought my mother had achieved the greater success in life. A woman of about my age promptly set me straight. She said, "Your father's story is my father's story. What could they do? They had to earn a living and they did."

When I was in high school, I went to help my father every day after school and all day on Saturday. There was a period of that time when my father became quite depressed, but he kept on working. When I came from school, he would often go to the back of the store and lie down. To my adolescent mind, he seemed to be saying that life was too much for him.

I guess I wanted a sort of Norman Rockwell father. Instead, I had this dear man who seemed to be struggling with his life. In those days, I knew nothing about psychology or about depression. I was no more understanding and compassionate than any adolescent boy might be. I wondered why he wasn't as I assumed other fathers were. To use the lingo of those days, I thought, "Why didn't my father straighten up and fly right?"

Helped perhaps a little by what was then psychiatry, my father emerged from his depression, but a few years later he became ill with cancer and died. Some time ago, my closest friend and I were having lunch together, and we got on the subject of fathers. We both had lost our fathers early in our adult lives, and each of our fathers had gone through a difficult time before they died. We both lamented that our fathers had died before we had become old enough and understanding enough to know what they had

gone through. They were gone before we were compassionate enough and expressive enough to tell them that we loved them, that they were dear to us.

I grew up eager to be a mainstream American, but I grew up feeling marginal. We were a Jewish family living one block from the largest Catholic Church in a very Christian town. In our neighborhood, the lower-class housing palpably began on Seventh Street, and those kids went to one school. Ninth street was middle class and in another school district. We lived on Eighth Street, and two of my sibs went to one school and three of us to the other.

At that time, I didn't ask my parents about their lives in the "old country" or how difficult their transition had been to the new world. It was not until I went away to college that all the unasked and unanswered questions began to arise in my mind. Those questions prompted my interest in psychology, but I found that my psychology courses didn't answer my questions or speak to my life.

I earned my doctorate in clinical psychology at the State University of Iowa. The psychology department there was steeped in behaviorism. Our studies were seldom focused on lives in all their richness, complexity, and challenge. Instead, we seemed to pull them apart and, study them piece by piece so that we could be sure of the little we were finding out.

When I came to the University of Hawaii, it was as a half-time assistant professor and half-time clinical psychologist in a clinic that was part of the university but served the whole territory of Hawaii. Later I became a full-time professor and maintained a limited private practice. I instantly loved Hawaii. It was beautiful, and everybody was a member of a minority.

When I began to teach, I was assigned none of the courses I had requested. One of the freshmen-level courses I was given had the curious title "Mental Hygiene." After teaching it every semester for a few years, it occurred to me that I could transform this course into the one that I was desperately looking for when I began college. Little by little it became the workshop, *The Illuminated Life*, that so fully occupies my own life and work these days.

I should mention that the transformation of this course proceeded hand in hand with the transformation of my orientation in psychology. At about this time, a fellow professor with a conventional experimental background was moving more and more into transpersonal psychology. With his model and with bravery bolstered by my newly won tenure, I morphed myself into a humanistic psychologist. That made all the difference. What had been a job became a calling. And it's never stopped calling.

At one point in my new calling, I found myself teaching the oldest students on the campus and the youngest. The oldest students were in the Elderhostel Program that I brought to our campus and coordinated for five years. The youngest students were in the Freshman Seminar Program that I created and directed for eleven years. I taught a version of my workshop in each program. Programs involving life review are often considered to be most appropriate for those in their post-retirement years, but I found just as much in the lives of my youngest students as in lives of my oldest that was ripe for exploration, affirmation, and amendment.

My workshop has undergone a lot of change in the two decades I have been giving it. Presently it involves 14, weekly, two-hour meetings. That can seem like a long time and considerable commitment to many persons, but it's hardly time enough to consider a life. Still, we sometimes offer the work in seven meetings with an option to continue

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## Lives—A Lively Livelihood

for seven more. The topics naturally break into two parts with the first seven concerned more with the past and present, and the second seven more with the present and future.

Each workshop is focused on a “life question.” A workbook poses each question, discusses it, and presents an “exploration”—a rather novel exercise—that helps the participants find their own answers. We emphasize that the responses to the questions be written out. This is in accord with the growing evidence that writing fully and feelingly about our affecting experiences can be beneficially both psychologically and physically. We also emphasize that this writing be done early so that the participants can, as Rilke writes, “live the question,” because some of the answer can be found in the way they are living their lives that week.

I’ve learned to do and not to do a number of things in this work. The first hour of each meeting is conducted by the leader for the group as a whole, and in the second hour the participants are arranged in groups of four in which they can share their answers to the life questions. Early in my work, I found that many persons don’t know how to listen to each other. Some hog the stage, some pontificate, some wander off on tangents or change the subject if it’s not agreeable, some recede into their chairs. Now we train all the participants in two well-defined roles—“the caring presence” and the “caring discloser.” We have specific rules for sharing that makes use of a “Talker Ticket-Admit One” based on the old idea of the Indian talking stick. Now, on our anonymously completed midterm and final evaluations, these small-group meetings usually get the highest rating.

I’ve learned that the persons to whom you are closest may be the ones you tell the least, and they can serve as the greatest restraints as you attempt to look at yourself in a new way. Consequently, I don’t put spouses, mates, best friends together in the same small group. The membership of the small groups constantly changes, and there is an opportunity for them to later opt for the same group if they wish.

It’s common knowledge that women are more willing than men to do the emotional work of life, but I didn’t know how very, very true this is. Many more women than men enroll in the workshop. I have had some groups composed entirely of women except for myself. I took it as a compliment when, in one of these groups, a woman leaned forward and said in a confidential manner, “I think I can say this because we are all women here. . . .” At that moment, I interrupted her with a modest cough but that didn’t deter her. At the end of that workshop, the women seemed to be in agreement that their participation was enhanced by the absence of other males. I recently was part of a “circle”—a variation of the workshop that is smaller and leaderless—made up by my design of four males and myself, and the four agreed that their participation was enhanced by the absence of females.

One woman who had taken the workshop before returned to take it again, and this time she brought her very good male friend along. It was about the third session when he came up to me during the break. He looked unhappy and made a complaint no woman participant has ever made. “Abe,” he sputtered, “This workshop is intrusive.” I replied that the work could take the participants deeply into their lives. He preferred his adjective to my explanation, but he stayed the course, and even sent me a friendly letter some weeks after the workshop ended.

I’ve learned that work of this kind does, indeed, bring many participants deeply into their lives. With its materials winnowed over the years and its carefully defined roles and rules, it provides a safe, supportive environment not easily found elsewhere. We are filled with our untold stories, including some we haven’t even told ourselves. I think we

come to know ourselves more fully as we observe ourselves share our stories with others and see what brought unexpected tears of relief or long silences or glimmers of insight. As we listen to the stories of others we gain new perspective on our own stories.

Except when I am managing large enrollments, I always take part in one of the small sharing groups. Someone has said that the pursuit of a life is like peeling an onion, there is always another layer and another layer under that. Indeed, I often discover new things about my life and, of course, it's an always changing life. When I am asked if this work is effective, I am perhaps overly fond of replying, "Look at me. I've taken the workshop many times and now I'm almost normal."

Actually we have some published research on the effectiveness of the workshop. At our Osher Lifelong Learning Institute at the University of Hawaii at Manoa, we twice administered the Ryff Scales of Psychological Well-Being to a workshop group composed of 18 women. (The group also had 3 men participants but too few to use in the analysis.) These scales measure self-acceptance, positive relations with others, personal growth, purpose in life, autonomy, and environmental mastery. One set of scales was administered before the workshop began and the other 14 weeks later after it had ended. A comparison group of 18 women enrolled in other Osher courses completed the same scales twice with the same interval of time.

No significant difference in scores was found between the two groups on the pre-test. On the post-test, there was a statistically significant improvement in the workshop group's scores on all six scales while the comparison group showed no significant change on any scale. Also, in the anonymous end-of-workshop evaluation, 16 of the 18 women gave the program the top rating of "very helpful." We weren't able to do a follow-up to see how durable these results were, but we hope to be able to do that with a future group. In any case, doesn't our psychological well-being deserve periodic attention?

For ten years I worked as a volunteer with terminally ill persons and their families. At first I worked with hospice patients and later with those who were terminal but not imminently in danger of dying. Those in the latter group I got to know quite well. One of them was a hospice worker himself until he became too ill. He was a thoughtful and eloquent man, and he informed his wife and me that I was free to use everything I learned in working with him to further my work. He said the knowledge that I would do this gave meaning to his dying.

The reason I think of him is that I would sometimes go with him to his support group, and I found that it provided little opportunity for the participants to get very deeply into their lives. My investigation of other support groups, some of which only meet once a month, showed a similar lack of opportunity. Consequently, I have been working on an extension of my workshop to make it more appropriate for continuing groups. I have just completed a pilot project that ran for 21 meetings and gave me an opportunity to introduce some of the newest ideas and findings of the positive psychology movement.

I've had a long life—almost 84 years. I have remained very much impressed by an essay written by the Swiss writer Hermann Hesse in which he said, in essence, that a young man's task is to build self and an old man's duty is to give himself away. That's what I have been trying to do since my "retirement" in 1988, which was the date of my last paycheck. I have two things left to give. One, my body, is willed to some future (I hope far in the future) class of medical students. I have been teaching all my life, and in making this gift I can go on teaching after death.

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My other gift is my workshop program whose development has been a work of love. I have been teaching others to lead the workshop, and I encourage them to develop it further. I and others I have trained have led the workshops in Honolulu at various senior centers, retirement residences, churches, and almost every semester at the Osher Lifelong Learning Institute at the University of Hawaii at Manoa. On the Mainland, there have been a few workshops in California, Florida, and Ontario, Canada. I am pleased to see some of the workshop materials adapted and used with a breast-cancer support group and also at our state mental hospital and three high schools.

Since the workshop won the national 2004 American Society on Aging-MetLife Foundation MindAlert Award in the category of innovative older adult learning programs, there have been many inquiries concerning the possibility of leader training on the Mainland. I don't do much traveling these days, but persons I have trained may be available next year to offer Mainland leader-training workshops, probably in association with Osher Lifelong Learning Institutes in urban centers.

In the meanwhile, I have been searching for funds to provide fellowships covering all or some of the expenses of qualified individuals coming to Honolulu for leadership training. Such trainings would extend over 14 days and involve work with me on a particular life question early in the week and a practicum placement later that week. In the practicum, trainees in pairs would lead a small community workshop group pursuing the same question. All trainees would need to have a sponsoring group to recommend them for training and later provide them with space and other support as they offered workshops for the members of their group. (Aptitude for learning to do the hula or ride a surfboard would not be required.) These are my present ideas, but I'm still learning new tricks and welcome the ideas and suggestions of others.

## Katrina's Fury

**Don Hedgwood**

The furious wind forces trees to the ground,  
its anger compelling them to bow their crowns.  
Wrenching branches from their broken trunks.  
Hurling them everywhere  
on the ground and in the air.  
Stinging rain falling in cutting sheets  
slices across and up and down.

The monstrous storm  
assaults all in its path  
threatening death and destruction  
on all who would dare  
stand and brave its vicious onslaught;  
defy its violent soul.

This beautiful community  
in which we chose to retire;  
now ravaged and bent.  
Valued homes grand and small  
Sliced in half, crushed to the ground  
by stately oaks and long leaf pines so tall.  
Once valued for their peace and serenity  
now piles of rubble with sticks and stones.  
Erased for eternity, a treasured home.

Power lines down, crisscrossing the streets  
tangled with branches and timbers and cars.  
No safe passage, no thruway for relief;  
a jumbled mass blocking our path.

But wait, the souls of our community  
 young and old, rich and poor  
 holding hands side by side  
 shoulder to shoulder restoring our pride;  
 making new, life once threatened;  
 embracing strangers from near and far  
 who come bearing gifts as friends they are,  
 restoring our faith, rekindling our hope.

Churches and groups, businesses and clubs,  
 mayors and councils, police and sheriffs,  
 national guard and soldiers, many more beings  
 bearing water and ice and clothing and food,  
 chain saws and tractors, forklifts and backhoes,  
 generators and pole climbers, service crews and linemen;  
 a cacophony of sounds and noises and factors;  
 working together; music that restores the soul.

So, where are you now Katrina?  
 Your rain a mere dribble, your wind a whisper?  
 And lo, with all your might  
 you found it impossible this community to smite.  
 We bent and stretched, groaned and moaned  
 but we never allowed you to bend our knee.  
 We stood against your fury, victorious.

But thank you Katrina  
 for new friends from near and far  
 for an inner strength that reveals who we really are  
 for renewing our spirit, for making us whole.  
 We have taken your rubble and built a place  
 for the spirit to grow, for sores to heal  
 for stronger bonds, for unbending will;  
 a place to be whole.

**Don Hedgwood** grew up in southeast Mississippi and earned degrees at Mississippi State University and Louisiana State University in the plant and soil sciences. His life's work has been in higher education, research, and administration. In retirement Don has turned to painting with watercolors and other media. He holds the title of professor emeritus at Texas A & M University-Kingsville and resides in Hattiesburg, Mississippi, with his wife Fran. Don is active in the Osher Lifelong Learning Institute at the University of Southern Mississippi.



## Renaissance Lessons for Today: A Course to Promote Purpose and Personal Growth in Later Life

**Diane E. Dreher**

### Abstract

*Recent studies have indicated significantly lower scores among older Americans when measured for purpose in life and personal growth, two vital components of well-being. To address this need, a new course, "Finding Your Calling: The Renaissance Within," was designed for older adults in Santa Clara University's Osher Lifelong Learning Program. Incorporating Ryff & Keyes' (1995) six components of well-being into its design, the course combined research on how men and women discovered their callings in the Renaissance, stories from Renaissance lives, and exercises from positive psychology to help older adults discover their strengths, set new goals, and increase their sense of purpose and personal growth.*

In his seventies, Henry Wadsworth Longfellow wrote these lines in a commemorative poem for his 50th reunion at Bowdoin College:

Cato learned Greek at eighty; Sophocles  
Wrote his grand Oedipus, and Simonides  
Bore off the prize of verse from his compeers,  
When each had numbered more than fourscore years,  
And Theophrastus, at fourscore and ten,  
Had but begun his Characters of Men.  
Chaucer, at Woodstock with the nightingales,  
At sixty wrote the Canterbury Tales;  
Goethe at Weimar, toiling to the last,  
Completed Faust when eighty years were past (1875/1883).

Although he got some of his facts wrong (Chaucer wrote *Canterbury Tales* in London over a period of many years), Longfellow was right about our ability to learn, create, and remain vital throughout our lives. Recent history holds other examples of people who have maintained a strong sense of purpose in later years. Linus Pauling actively pursued his research into his nineties, Golda Meir served as prime minister of Israel in her seventies, and after twenty seven years in prison, Nelson Mandela became

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president of the new South Africa at age 76. Unfortunately, such people are still the exceptions. Research from the MacArthur Foundation reveals that the average person's sense of purpose decreases after age 39, diminishing rapidly after the late fifties (Ryff & Singer, 2002).

A sense of purpose is essential to a meaningful life, regardless of our age, gender, IQ, culture, education, or external conditions (Frankl, 1946/1967; Fabry, 1998; McGregor & Little, 1998; Seligman, 2002). Carol Ryff and her colleagues have seen purpose and personal growth as two necessary factors for well-being (Ryff, 1991; Ryff & Keyes, 1995; Ryff & Singer, 1998). Still, research has shown that people aged sixty-five or older have significantly lower scores in purpose in life and personal growth than other adults (Ryff & Keyes, 1995; Ryff & Singer, 1998). This is especially true for older men, who see themselves as declining in both areas (Ryff, 1991). In fact, Ryff's research on "possible selves" has revealed that while younger and middle-aged adults expect to keep improving in these two areas, older adults feel that they will either decline or remain the same.

One explanation for these gloomy statistics could be that older people in our culture experience unsettling changes in four areas of adult identity: their roles at work and in the family, sense of personal control, and goals. Occupational roles, a major source of personal identity (Myers & Diener, 1995), disappear at retirement, along with the familiar structure, colleagues, and daily routines of working life. For most older adults, family life, a second defining feature, also changes. Children grow up and leave home, becoming less accessible. Thus, older Americans lose a valuable sense of community and a major source of self-worth (Baumeister, 1991). A third important factor in well-being is a sense of personal control (Langer & Rodin, 1976; Myers & Diener, 1995; Ryff, 1991). As Langer and Rodin found in their classic study, even the small acts of choosing meal preferences and caring for a plant were associated with better health and longevity for nursing home residents. A fourth factor in well-being involves progress toward meaningful goals (Emmons, 1986; Myers & Diener, 1995). Without occupational goals and deadlines to structure their days and provide a sense of accomplishment, many retired people experience a diminution in personal control and overall self-worth.

Baumeister (1991) has found that when people lose their jobs, even leisure activities can fail to satisfy them because recreation draws much of its enjoyment from a contrast with work. Similarly, the endless rounds of golf, tennis, bridge, and other leisure activities offered by many retirement communities can fail to satisfy people unprepared for retirement, whose major source of identity has been their work.

The fact that so many older Americans have diminished purpose and personal growth has troubled researchers. Ryff and Singer (1998) have expressed concern that these negative expectations could result in a self-fulfilling prophecy, precipitating a downward spiral of declining mental and physical health.

While admitting that further research is needed to understand why these two factors are so low, Ryff and Singer propose that one cause could be what Riley, Kahn, and Foner (1994) have called a "structural lag." While age spans have increased over the past few decades, our culture has not provided meaningful roles, opportunities, and resources for older Americans (Ryff & Singer, 1998). Deprived of earlier sources of identity and meaning, they are left in what Baumeister has called a "meaning vacuum." Realizing how important it is that they feel "useful and needed by others," he says they must find new sources of meaning to replace those they have lost (1991, p. 320).

At any stage of life, adding new sources of meaning brings feelings of joy and empowerment, increasing our overall well-being (Baumeister, 1991). Sources of meaning can include new relationships, occupations, or religious communities as well as learning new skills, discovering new interests, or taking on new challenges. Although today many older adults lose their sense of purpose, this need not be the case. The latest research in neuroscience tells us that our brains continue to develop throughout our lifetimes, and research shows that education increases our sense of purpose throughout life (Huttenlocher, 2002; Ryff & Singer, 2002). A new interest can create what Ryff and Singer have called a “positive spiral,” resulting in greater health and well-being. Calling for programs to reverse current attitudinal declines among older adults, they point to Israeli kibbutzim, which draw upon elders’ wisdom and the Center for Creative Retirement in North Carolina, which combines education with volunteer work (Ryff & Singer, 1998; 2002).

Offering opportunities for renewal through education, interpersonal interactions, and new interests, lifelong learning offers a valuable solution to the “meaning vacuum.” In 2004-05 Santa Clara University began the first year of our Osher Lifelong Learning Program. When preparing my new Osher class, I felt that the older adults could draw inspiration from the lives of the men and women I’d been studying in Renaissance biographies. Since Bandura (1971) has found that social modeling can occur with “symbolic models” from books, perhaps the lives of exemplary men and women from history would provide my students with what today’s popular culture lacks: models of healthy adult development and positive aging, offering examples of creativity and personal growth from the Renaissance that they could apply to their own lives.

For what was the Renaissance, really? A time of major transition between the old world and the new, the known and the unknown, paralleling on a cultural level the transition in the lives of older adults who leave their old roles and relationships to journey into a terra incognita, the region of later life for which our culture provides no maps and precious little in terms of models for positive aging. The Renaissance was also an era of cultural transition much like our own, when the new printing press unleashed a flood of information equaled only by the advent of the computer and the Internet; when explorers sailed boldly across uncharted seas to discover new worlds, as astronauts have ventured through vast oceans of space; when Leonardo and Michelangelo studied human anatomy and William Harvey discovered the circulation of the blood, as scientists in our own time have developed nanotechnology and mapped the human genome.

A time of great uncertainty yet equally great creativity, the Renaissance possessed a paradigm of personal growth—the sense of calling—that convinced individual men and women they each had a unique set of gifts, talents and skills, and were expected to use them to make a personal contribution to the world. I’m convinced that the belief in calling helped create the Renaissance. In a process known as the “self-fulfilling prophecy,” our expectations dramatically shape our experience (Merton, 1948; Rosenthal, 1995; Rosenthal & Jacobson, 1968). Because generations of Renaissance men and women expected to discover their callings, in remarkable ways, they found them, combining ideals and actions into unprecedented creative contributions to science, religion, culture, politics, and the arts.

A course on calling in the lives of men and women in the Renaissance and today seemed especially appropriate to Santa Clara’s Osher Program. The course would be a natural part of our campus culture, with its Jesuit tradition of “discernment.” In the past

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three years our “DISCOVER” program, funded by the Lilly Endowment, has made the campus especially aware of callings. Intended to help undergraduates discover their callings, DISCOVER has offered a series of lectures, retreats, short classes, and residence hall discussions, as well as programs for faculty, staff, and the local community. My course would also draw upon current research, for aspects of what the Renaissance knew as calling have become areas of investigation in psychology. Studies on work and fulfillment have focused on the sense of calling as more than a job or career (Bogart, 1994; Davidson & Caddell, 1994; Richardson, 1993; Seligman, 2002; & Wrzesniewski, McCauley, Rozin, & Schwartz, 1997). In its original Renaissance definition, a calling would include purposeful retirement, since it promotes a meaningful life, not merely a livelihood.

A focus on calling could help older adults increase their sense of self-worth by focusing on their strengths, again relating Renaissance concepts to current research. As our Renaissance counterparts found meaning by discovering and using their gifts, research in positive psychology has focused on helping people discover their “strengths,” and develop them to live happier, more successful lives (Hodges & Clifton, 2004; Seligman, 2002). Martin Seligman (2002) has maintained that we each have a set of personal strengths, or “signature strengths,” and that using these strengths on a regular basis brings greater joy and meaning to our lives. Recently, Peterson & Seligman (2004) have identified 24 character strengths and virtues, based on an extensive international study, and Seligman’s Authentic Happiness web site even offers an on-line survey people can use to discover their strengths ([www.authentichappiness.org](http://www.authentichappiness.org)).

When people use their strengths, they become enthusiastic and energized, experiencing what Mihaly Csikszentmihalyi has called “flow,” a sense of vital engagement with life that has been identified as a key aspect of healthy aging (Nakamura & Csikszentmihalyi, 2003; Csikszentmihalyi, 1990; 1999). Flow occurs when people are challenged by what they do. When a task exceeds their abilities, they become frustrated. When a task is too easy, they are bored. But when their abilities are equal to the task, they feel exhilarated, becoming one with the process. They become even more energized when they *believe* in what they’re doing. David Lykken (1999) has found that people are happiest when they spend time in productive activities they consider worthwhile. Thus, when people have a meaningful challenge, when they use their strengths to make a positive contribution to the world, they feel happy, energized, and filled with greater purpose. This was, ideally, the experience I wanted to convey to my students.

My Osher course, “Finding Your Calling: The Renaissance Within,” combined stories from Renaissance lives, assignments from positive psychology and Ignatian Spiritual Exercises into a format balancing lecture with interaction, active goal-setting with reading and reflection. I wanted to offer the Osher participants vital tools to help them discover their strengths, develop their callings, and find new paths to purpose and personal growth.

My class addressed all six components of personal well-being (Ryff & Keyes, 1995):

1) By identifying their strengths, the men and women in my class would gain in *self-acceptance*; 2) by learning about Renaissance lives and developing their own abilities, they would increase their sense of *personal growth*; 3) by engaging in productive course assignments, they would increase their *purpose in life*; 4) by interacting with other students, they would develop more *positive relationships*; 5) by setting goals and pursuing them, they would develop greater *environmental mastery*; and 6) by developing greater self-determination, they would increase their sense of *autonomy*.

Building upon insights from developmental psychology (Erikson, 1950/1963; Levinson, 1978) and Renaissance lives, the class focused on how people develop their callings, showing how each stage of adult life offers new opportunities for renewal. Using stories about Michelangelo, Queen Elizabeth I, Galileo Galilei, St. Ignatius Loyola, William Shakespeare, and others, the class showed participants how to discover their personal strengths, free themselves from debilitating distractions, discern their guiding values, and chart a new direction. The course text, *Inner Compass*, a guide to Ignatian discernment by Margaret Silf (1999), offered questions for reflection while Renaissance lives offered inspiring role models. In lecture, participants learned how John Donne's calling changed over time as he went from being a romantic young poet, intent on a diplomatic career, to "holy Doctor Donne," an inspirational minister and devotional writer. They learned how Magdalen Herbert discovered new strengths when she was left a widow with ten children. Although life spans were shorter in the Renaissance than today, I felt my students would take heart from the lives of people who overcame challenges, remaining vital, engaged, and creative throughout their lives, people such as Queen Elizabeth I, who ruled England for 45 years until she was 70; St. Ignatius Loyola, who changed careers in middle life, returning to school in his thirties and founding the Jesuits at 49; and Michelangelo, who made magnificent sculpture in his late eighties.

When I taught the course in April, 2005, there were 20 students, men and women from their fifties through their seventies: intelligent, articulate, and eager to participate. They shared stories from their own experience, often relating them to the Renaissance lives, and we all learned from one another.

This was a short course, divided into three, two-hour class sessions over three weeks. The first week, "Looking Back: Discovery," began with a lecture on calling in the Renaissance. Students were then asked to reflect on a "peak experience" (Maslow, 1971), a time when they felt a deep sense of joy and meaning, then write down the details. Each student described his or her peak experience to a partner, who listened, recording other person's strengths, and then pointing them out. Then would then switch roles. The room was filled with energetic conversations. We ended the class with a discussion of "flow." Students were given an article by Csikszentmihalyi (1999) to read for next time. Assignments also included reading about discernment in *Inner Compass* and finding out more about their strengths by either doing Martin Seligman's on-line survey of signature strengths or asking three people they knew to list their five top strengths.

The second week, "Looking Within: Discernment," began with a discussion of the strengths assignment. Most students had done *both* the survey and asked three people about their strengths. Some had even had their husbands or wives do the survey. Everyone seemed energized by the assignment, realizing that they had valuable gifts to share. Then through lecture and discussion, we moved on to discernment of values, using a practice from the Ignatian Spiritual Exercises. The class closed by describing some Renaissance lives, then asking participants who they admired today and why—another way to discern their values. Assignments for next time included reading on discernment in *Inner Compass*, reflection on values, and a short reflective essay on either discernment or a lesson from a role model.

The third week, "Looking Ahead: Direction," began with a discussion of lessons from the assignments, then focused on the journey of following a calling, referring to Renaissance lives and Joseph Campbell's (1949/1968) "hero's journey." In the final exer-

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cise in the course, people met in small groups to choose a new direction, combining their strengths and values into goals for the future.

From student comments after class—no one wanted the course to end so soon—I sensed that we needed at least one more class session to benefit from all of the rich material in the course and complete the process. Course evaluations indicated an overall positive response with students commenting favorably on the knowledge they gained, the handouts, the PowerPoint presentations, the discussions and small group work—“the opportunity to participate,” and “emphasis on personal growth.”

The Osher course was the high point of my academic year, and Santa Clara ended the first year of our program by welcoming 229 participants. Our director, Patricia Simone, associate professor of psychology, and her assistant director, Nicole Marciano, a recent graduate in psychology and gerontology, created a varied curriculum of courses and activities, cultivating a strong sense of community.

This year, our program is offering a longer course format: four sessions followed by a fifth session wrap-up and celebration, to build the sense of community that is a both a major strength of our program and a crucial factor in well-being (Ryff & Keyes, 1995). I look forward to offering my course again, with time for additional readings from psychology and more focus on goal setting, drawing upon the research on hope interventions by C. R. Snyder (1994, 2000).

My own hope, in this article, is to encourage faculty in other Osher programs to find ways to deal with issues of personal development, offering older adults effective tools and strategies they can use to develop greater joy, personal growth, and purpose in life.

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Renaissance Lessons for  
Today: A Course to  
Promote Purpose and  
Personal Growth in  
Later Life

**Author's Note**

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## Guided Autobiography: Writing and Telling the Stories of Lives

**James E. Birren and Cheryl M. Svensson**

### Abstract

*This article describes a course that is designed to help older adults write their autobiography. Participants are led through ten sessions of two hours or more in length. The Guided Autobiography Method is based on three concepts: priming autobiographical memories, working with common themes, and engaging in a group process to tell one's life story. The authors share their experiences facilitating this course and enumerate the benefits that are often derived by their older learner participants.*

### Introduction

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There is increasing public interest in writing and telling the stories of life. There may be several reasons for the rise in interest, one of them that we are living much longer than previous generations. The transition into late life is in a cultural era in which there are few models of how to use the gift of long life. This gives rise to questions such as: Where have I been? Where am I? Where am I going? Writing an autobiography provides the opportunity to discover, clarify, and deepen the meaning of a lifetime of experiences. Adding to the interest is the fact that parents and grandparents want to leave their life stories for their children, grandchildren and friends as a legacy. Another factor that may be influencing the desire to write about the personal side of life is that the current era appears to be increasingly *impersonal*. Societies are becoming more efficient but in doing so, the personal factor in many services all but disappears. In the past, local shops had owners who knew their customer's and children's names. Small shops are disappearing and are being replaced by large shopping centers. Selection of items to be purchased can be done without the need or opportunity to speak to anyone. Then checkout of purchases is completed by scanning the items and paying with a credit card; one can enter and leave a store without speaking to anyone or knowing anyone. Businesses and societies have become increasingly efficient with email but with a loss of personal contacts that encourages face to face exchanges about our families, work, and health. These are elements of our life stories waiting to be expressed in our autobiographies.

In response to the growing interest in autobiography, a number of approaches have developed to assist individuals in telling their life stories. Since Robert Butler first wrote

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about life review in 1963, many different professions have encouraged and helped individuals write and tell their life stories. Social workers, nurses, psychologists, educators, clergy, and others have published accounts of their methods of assisting individuals in telling their life stories (see Bornat, 1994; Burnside & Schmidt, 1994; Fivush & Hayden, 2003; Kenyon & Randall, 1997; Webster & Haight, 2003). The International Association of Reminiscence and Life Review has been formed which provides professionals with opportunities for presenting their methods and findings about autobiographical processes. In this paper we describe the Guided Autobiography (GAB) method that assists adults to tell and organize their memories about growing up and growing older into autobiographies. The direct and indirect benefits of participation are also described.

### Guided Autobiography

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The Guided Autobiography method was developed by James Birren more than 30 years ago. In the past years he has conducted hundreds of Guided Autobiography groups not only in the United States, but in other countries where interest in autobiography is growing; Brazil, Canada, Japan, Singapore, and in several European countries. Two books describing Guided Autobiography have been published (Birren & Deutchman, 1991, and Birren & Cochran, 2001) as well as numerous articles. Guided Autobiography has become widely recognized as an effective method to enable participants to understand and appreciate their life stories and move ahead with renewed optimism and increased self-esteem. It also results in benefits for institutions that conduct GAB groups by increasing the personal relationships among participants who may be new to a community or institution.

### Description of the Guided Autobiography Method

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Guided by a trained instructor, participants are led through ten sessions of two hours or more in length, meeting once a week. Each session has an opening segment that lasts about an hour, followed by a short break. Then the participants reassemble into small groups in which the members read what they have written during the week. Each weekly session is organized around a life theme: Branching Points; Family; Money; Work and Career; Health and Body; Philosophical or Spiritual Journey; Death and Dying; and Goals and Aspirations.

During the opening segment of each session, the participants meet as a large group for discussion and instruction. They are given a single sheet handout that describes the theme of the week including ten or more priming or sensitizing questions to help participants recall relevant memories. The leader reads some of the sensitizing questions and evokes group discussion to get the participants thinking about the theme. The participants are told to write approximately two pages on the theme before the next meeting. All writing is done outside of the class. If the theme is particularly productive for them, they are told not to stop writing, but in the small groups the allotted time for sharing allows only reading of two pages.

Following the theme presentation for the entire class, the class breaks up into small groups of five to eight members, each under the direction of a group leader. Each participant reads aloud the two pages he or she has written about their life according to the theme for that session. It is in the telling and listening to life stories that the group

process has an important influence on eliciting the richness of memories of the participants. Often spontaneous comments are made that show the priming effect of the group. Writing and sharing one's life story with others in a group is a productive and rich way to achieve meaning in life as the uncertainties of the past, and the contradictions, paradoxes, and the impact of the recalled events of life are put into perspective.

### Concepts of Guided Autobiography

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The Guided Autobiography method is based upon three concepts: a.) priming autobiographical memories; b.) using common themes of life; c.) engaging in a group process to tell one's life story.

Priming memories in a group facilitates recall among the participants. For example, "Oh, that reminds me of the time I started school." When topics are discussed in a group, the memories of other group members are stimulated and they begin to remember events long forgotten. The priming questions are organized around life themes and are designed to provoke recollections. It has been known for some time that older adults are better performers when presented with material that stimulates recognition rather than recall. Earlier research indicated that for healthy person the vocabulary size doubles between graduation from college and age 60. Thus a great deal of information is stored in the older nervous system that is elicited by external stimulation. For this reason, the reading of autobiographical material in small groups stimulates the mature mind and old memories, thought to be forgotten.

Common themes of life underscore both the universality of our lives as well as the uniqueness of our experiences with life events and their interpretation. The autobiographical themes have evolved through experience with groups and with the intent to identify themes that are common to most lives. The themes are chosen to elicit both positive and negative experiences. In a sense, the themes are designed to evoke thinking about the strong threads that bind together the fabrics of lives. Each autobiographical theme is interpreted, absorbed, and written about in a personal or idiosyncratic way, just as each of our lives differ from one another. No two lives are the same. For example, the first theme is Branching Points. Everyone has experienced branching points in their lives but the age at which they occur, their timing, expression, and impact varies tremendously. A move early in childhood from one state to another may be life enhancing for one person while for another person a difficult event that changed the direction of his or her life. A war or natural disaster can be a catastrophic event for one person and by contrast for another lead to an expansion of life. The life themes help the participants to focus and offer a way for them to begin to organize the massive amounts of information accumulated in life.

The group process as used in GAB provides a number of beneficial outcomes. First and foremost, listening to the accounts of the lives of others stimulates recall by similarity, contrast, and novelty. For example, in one group two members discussed the 'Depression' and the impact it had on their lives. One person lived in the city and recalled with horror the food shortages, long bread lines, rationing and constant hunger. In contrast, the other person had lived on a farm during that period and life when on as usual; food was plentiful and the bartering for goods that was typical of those times continued. One person was unaffected by the Depression while the other one learned the hard lessons of little food, no work and no money.

### Guided

Autobiography has become widely recognized as an effective method to enable participants to understand and appreciate their life stories and move ahead with renewed optimism and increased self-esteem.

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A feeling of bonding and camaraderie develops in the groups as the members become intimately involved in listening to the life stories of fellow members, while sharing their own stories. Friendships grow that extend beyond the time together in the autobiography group. New behaviors, new activities, and practices develop. The group encourages and supports one another in self-development. After participation in an autobiography group, motivation for new activities appears to be released. It seems to release latent interests to try new things.

### Benefits and Outcomes of GAB

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There are multiple benefits obtained from participation in a GAB class. The goal most people have foremost in mind when they sign up for a class is to write their life story for family or friends. This goal is met in GAB since all members will have at least twenty pages written of their life story by the end of the sessions. This is the overt, observable reward from taking the class, but there are other intangible benefits.

Firstly, GAB participants come to know, understand, and appreciate their lives as lived in ways they may never have known before. They come to realize how much they have lived through and moved on. In their daily lives, rather than concentrating solely on the demands of the day, they come to appreciate that they are survivors of many events.

The life themes provide the opportunity to look closely at the important areas of our lives rather than just repeating the same 'stories' we have told ourselves and others for so long. The oft-repeated story about "walking miles in snow and freezing temperatures to go to school" may be true...but what lies beneath it? Was the family warm, supportive or cold, critical and unflinching in demands? GAB participants go deeper into the story and reach new depths of self-understanding.

GAB participants also get to know others in the group at a profound level. A deep connection is forged when we listen and respond to one another while sharing our own life stories. The differences as well as similarities surface among people and tolerance, acceptance, and appreciation are the result. In one of the first studies on GAB it was found that while there were changes in attitudes toward the self, the largest change after participation was in "attitude towards others." The *others* became more like they were. This implies a greater acceptance of others as a result of the group experience of sharing life stories (see Birren & Schroots, 2006). Another aspect of the improved self-confidence is that early life memories become more positive. The internal changes in the way we view ourselves appear to shift positively, a shift towards decreasing the distance between our ideal selves, or the selves we aspire to be, and the actual selves we believe we are. Sharing our life stories also contributes to our view of our social image—the way we think other people view us.

Self-confidence grows in GAB participants as their writing proves to them, "I can do it, I can write." Many have wanted to write their story for years, but never knew how to begin. The structure, themes, and group support in GAB gives them the confidence they need to begin writing. The writing always improves with time as participants learn from one another and find the courage to write from the heart as well as the mind.

As old memories are confronted and reassessed in the supportive atmosphere of the GAB group, self-esteem and self-worth increase. Often members learn to let go of past hurts and move forward into new ventures with renewed strength and vigor. They may use their time in volunteer activities or new creative endeavors.

Finally, and possibly most important, GAB members have fun! They have fun learning about themselves and others and learn to laugh at our all too human foibles, and share in the sheer joy of growing beyond one's past. Humor has come to be regarded as a positive trait in adapting to life. It is often expressed in laughing at one's self in an autobiography group. However, tears may also be shed in some small groups, as painful events of an individual's life are touched upon. Positive and negative feelings are evoked in GAB, and are fitted into the life stories with greater acceptance.

### Responses from GAB participants

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Over the years, evaluations and comments have been collected from former GAB participants. Former GAB participants provide examples of the benefits and strength of the process. One Guided Autobiography class has continued to meet for the past five years on their own, calling themselves the "Un-guided Autobiography" group. Another community GAB group that was organized in an AARP chapter has been having reunion meetings for nine years. It meets every few months to share their written accounts of a new theme of life. The desire to remain in contact is a value in the community and institutions.

### Comments from GAB participants

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The following are comments from former GAB participants that speak to the specific benefits of GAB.

#### *A Written Legacy*

- "I gained a product I can polish and complete as is—or add more as desired."
- "My goal was to write an autobiography and this class has really pushed me into doing just that. Former classes got me thinking...this one got me doing!"

#### *Appreciation of one's life as lived*

- "I came to terms with some sad events in my life and feel more at peace about those events. This was a great experience."
- "Writing all these stories has helped me to integrate many difficult experiences and use them for a springboard to go forward."

#### *Friendship and Understanding*

- "I learned insight into other's lives. After listening to my classmates, I was not alone with life's problems; many had problems much more devastating than mine."
- "I really enjoyed the interaction of the other class members, hearing their life stories and opinions."
- "A feeling of connectedness with others in the group, and *especially* in our small group."

#### *Self-confidence*

- "I have enjoyed this course tremendously. It has made a difference in my outlook. I have found solace in looking back and courage to go forward."
- "I gained self-respect. I gained understanding about my life from childhood to now and it helped me be more at ease with myself and others."

Sharing our life stories also contributes to our view of our social image.

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### *Self-worth*

- “I feel more like a whole person.”
- “Further insights into that most important of persons, ‘me’ but I must confess, I’m beginning to find this wealth of self-knowledge a bit dull. I must be ready for a reincarnation.”

A colleague and Guided Autobiography facilitator from British Columbia, Dr. James Thornton, recently asked participants who completed a GAB class what they had learned. The following quote sums up the power of the GAB process succinctly.

1. I am learning to trust.
2. I am leaning not to judge others.
3. I am learning to have faith in myself.
4. I am learning to forgive myself.
5. I am learning to have better self-esteem.
6. I am learning to love myself.
7. I am learning to love others.
8. I am learning to let the small stuff go.
9. I am healing the past.
10. I am looking forward to the future.

## Epilogue

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There is a growing interest in autobiography, the writing and sharing of our life stories. The interest may be motivated by an impersonal era of increasingly efficient societies and businesses. In the past there has been more interest to developing cemeteries for our bones than for help in passing on our life stories and developing archives for them. Guided Autobiography is a group method of priming memories in important themes that contribute to the fabric of lives. Significant new areas of research are opening up as analyses are revealing the structure of lives as revealed from the inside, the self-perceptions. The personal attributions of causality in lives can vary widely with differences in culture, life events, and gender. Studies of such issues await an expanded era of autobiographical studies in which the richness of lifetime memories are stimulated for personal and institutional benefits.

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## “Laughing Matters” at Eckerd College

**Mary S. Khosh**

### Abstract

*“Laughing Matters” was formed as an interest group of the Academy of Senior Professionals at Eckerd College to help promote wellness and sociability among the members. The program was designed to support and maintain optimism and positive attitudes while enhancing the immune system. The following program description shares some of the details—and spirit—of this popular course.*

The Academy of Senior Professionals at Eckerd College (ASPEC) is one of several lifelong learning groups that are present on the Eckerd College campus, in St. Petersburg, Florida. The college is also home to a dynamic OLLI program and an Elderhostel.

ASPEC is a peer-taught, self-governed organization with a membership application process. At ASPEC, we have over 40 interest groups that hold regular sessions—some meet weekly, others bi-weekly, and still others monthly at Lewis House on the Eckerd College campus. We have identified one of these interest groups which we believe is relatively unique and could easily be adopted by programs in the Osher Lifelong Learning network. This group attracts a wide range of our members and is informative, therapeutic, and entertaining. It is called “Laughing Matters.”

What can enjoyably exercise the heart and simultaneously boost the mood? The answer is not necessarily “running on a treadmill”—it is laughter. Laughter bonds people to one another and teaches powerful lessons about survival in an increasingly stressful world.

“Laughing Matters” was formed as an interest group to help promote wellness and sociability among the members. The program was designed to support and maintain optimism and positive attitudes while enhancing the immune system. One of the reasons doctors prescribe exercise for their patients is that even light exercise can increase heart and respiration rate, oxygenate the system, and reduce levels of stress hormones. In the 1980s, it was suspected that a good burst of laughter might do the same. Research found that laughter did reduce stress chemicals—cortisol, the primary stress hormone, most significantly. Follow-up research found that therapeutic laughing groups helped cardiac patients lower blood pressure and lower stress-hormone levels. These patients

also had fewer episodes of arrhythmia and fewer repeat heart attacks.

Laughter Clubs have formed in hospitals across the country, and since 1999 more than 1,000 “Laughter Leaders” have been certified. These people lead patients in making merry, blowing off steam, and discharging tension by connecting with others and sharing a good laugh.

This ASPEC interest group is led by one of nine members of the “Laughing Matters” committee. Members meet to select the programs, decide on the format, select a leader or co-leaders, develop a theme, etc. For example, “Laughing Matters” has done quite a bit with both British and American humor starting with Monty Python. (We saw several of the most highly rated episodes.) Among other things, we have discussed the differences between British and American humor—target audiences, inside jokes, wit, puns, and nuances of language.

In the future we plan to explore humor from every geographical region in the world. We also plan to continue our coverage of a wide range of the media including old-time radio, early classic television humor, vaudeville, political cartoons, sports humor, children’s books, lawyer jokes, etc. There is no end to our subject matter because we do not censor. We have agreed that there will be no “taste police” and whatever is presented for discussion is explored, discussed, and enjoyed.

Additionally, “Laughing Matters” has offered programs on the psychology of humor and the impact of humor and laughter on the immune system. However, the programs primarily focus on seeing the funny side of everyday life and generating laughter. We have laughed at the Three Stooges, Sid Cesar and Imogene Coca, and “Candid Camera,” to name a few. We have produced original skits, written our own jokes, and offered a holiday music program of silly seasonal songs. Nothing is out of line for “Laughing Matters”—fun can be poked at anything and no group is immune. (We like to say that a person’s “funny bone” can be anywhere in the body.) Bill Cosby once said, “You can turn painful situations around through laughter. If you can find humor in anything—even poverty—you can survive it.”

An ASPEC (Academy of Senior Professionals at Eckerd College) member since 1993, **Mary S. Khosh** previously led an industrial psychology consulting firm in Cleveland, Ohio, that she founded in 1983. The firm was honored as one of the “fastest growing businesses in Northeast Ohio” by the Weatherhead School of Management at Case Western Reserve University in both 1990 and 1991. Her work with the Cleveland Browns as a personal career coach led to the article, “The Confidence Game,” that was published in the July-August 2005 *Harvard Business Review*. Mary is a member of the consulting staff of the Leadership Development Institute at Eckerd College. She is currently a community member of the Board of Trustees of Chautauqua Institution and vice president of the Chautauqua Center for the Visual Arts. Married for 44 years, Mary has four daughters, four sons-in-law, and eight grandchildren.

Laughter bonds  
people to one another  
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stressful world.

# Learn and Lead: Developing Course Leaders and Curricula in a Lifelong Learning Institute

**Sharon Sokoloff and Myrna D. Cohen**

## Abstract

*One challenging developmental task of lifelong learning institutes is establishing a steady, ever-replenishing supply of high quality course leaders and diverse, enriching curricula. In this article, the authors present the context for, description, and outcomes of a course developed and conducted at the OLLI at Brandeis University. "Learn and Lead" encourages, give practical input, and assists program members to become course leaders. The pilot phase of the course indicates that the model is highly replicable and/or adaptable in other LLIs and has great potential to develop course leaders.*

## Introduction

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In his landmark report *Purpose, Potential and Productivity in Later Life: 21st Century Retirement Study*, Gene Cohen, M.D., Ph.D. tells us "The single most thought provoking and organizing question for influencing thinking about retirement is 'What gives you a sense of meaning, a sense of purpose in life; what is important to you?'" Second only to the nearly universal response "making a contribution to others" is the reply "lifelong learning-the desire for continuing education in varied forms..." (*Atlantic Philanthropies*, May 2005, p. 7) Throughout the inaugural edition of this journal, authors have informed us about a range of theoretical, historical and program issues related to the lifelong learning institute (LLI) movement.

The purpose of this article is to present a program idea at the heart of establishing and sustaining successful LLIs, i.e., the ongoing development and improvement of course leaders and curricula. One of the most important developmental tasks of any LLI, some would argue the most crucial, is establishing a steady, ever-replenishing supply of high quality course leaders, and diverse, challenging and enriching curricula, semester after semester. Based on our experience in the early years at the Osher Lifelong Learning Institute (OLLI) at Brandeis, it is also highly challenging endeavor.

## OLLI at Brandeis Learning Model

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One challenge in the LLI movement to date is the lack of a common language for discussing curricula, course models, faculty and leaders. As a community of programs, we do not yet have a common language to define the various pedagogical models we use in our programs. For example, programs may call their course leaders “faculty,” “experts,” “instructors,” “peer leaders,” “study group leaders,” or something else. One might think these terms represent mutually exclusive models of pedagogy. They do not. Because we use different terms or sometimes use the same terms but mean different things, we often misunderstand one another regarding what our learning models are. This is something OLLI network leaders and others in the field of lifelong learning should address.

Courses at the OLLI at Brandeis are peer-led by program members. They are called “study groups” and our course leaders called “study group leaders” (SGLs). We use these terms in contrast to teachers or faculty to suggest the participatory nature of our learning community. Most study groups are discussion-oriented, as opposed to lectures, and one of the skills of a good SGL is the ability to facilitate and manage discussion among participants in a way that members meet their learning objectives. Even for a SGL who does lecture, the exception rather than the rule in our program, the ability to manage discussion is a necessary skill.

SGLs in the Brandeis program bring a wide range of experience, skill, and expertise to the classroom. Some are emeriti professors (mostly from colleges and universities other than Brandeis) who lead courses in their areas of expertise; some emeriti take on new topics for which they have a passion, something they have always wanted to study. Other SGLs are “experts” leading courses in their field of expertise, e.g., attorneys leading courses on *The Supreme Court* or a retired surgeon leading a course on *Health Care Ethics*. Others are members who have an interest, passion and/or a lifelong avocation in a topic. Two examples in our community include: 1) a insurance businessman who has studied Shakespeare for thirty years who now leads a different study group on Shakespeare each fall to an increasingly large class of “groupies,” and 2) an engineer who spends up to two years developing different courses on mythology.

SGLs at the Osher Institute at Brandeis are not paid. We do, however, provide incentives to encourage and rewards to thank them. First, SGLs do not pay OLLI tuition the semester in which they lead courses; they have full membership privileges for free. Second, SGLs are placed in the courses of their choice each semester. When study groups are overenrolled (as they often are), a lottery is used to assign members to study groups. When this occurs, however, SGLs are automatically placed in their first choices. Interestingly, this seems to be of more value to SGLs than the free tuition.

## Osher Institute at Brandeis: Curriculum Development in the Formative Years

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The Osher Institute at Brandeis University, originally the Brandeis Adult Learning Institute—BALI—was implemented in September 2000, after ten months of planning. (BALI became an OLLI in February 2004.) The initial spark that led to the development of BALI came from the Harvard Institute of Learning in Retirement (HILR), one of the oldest programs in the United States, established in 1977. In 1999, HILR encouraged Brandeis to begin a program to help meet the increasing demand for LLIs, a demand they could not meet. One way HILR supported and assisted the development

Learn and Lead:  
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of the Brandeis program was to “share” experienced SGLs. Some of those course leaders came for one semester only. Others enjoyed the emerging community at Brandeis and have continued to lead courses at HILR and Brandeis. In the early years, the majority of OLLI at Brandeis SGLs came from outside our program, e.g., HILR and an assortment of experts the curriculum committee identified outside of our community.

Over time, the number of study groups offered per semester grew, and continues to as the program matures. We began with 18 study groups in September 2000, reached 30 per semester in the fall 2005 and are moving toward 40 per semester in the next two years. So, in the early years at the OLLI at Brandeis the focus has been on finding “enough” SGLs, a number that has continued to increase over time, and to finding quality leaders in as many diverse topics as possible.

Thus, in our formative years, our focus was on identifying, supporting and assisting potential SGLs from outside of our community even though the premise we were founded on was *the members are the leaders and the leaders are the members*. In these years, program leaders (staff and members) did not emphasize the vital need for members to become SGLs—creating a culture in which members did not “own” this activity or realize how critical it was for them to do so. The curriculum committee focused less on our members as potential SGLs due to members’ resistance to the idea related to the following reasons.

1. Members’ fear of not being a “good enough” to be a study group leader.
2. Members’ concern about the time it takes to develop and lead a quality study group.
3. Members’ lack of knowledge of how to identify a good topic, develop and lead a study group.
4. Member leadership, e.g., advisory council and curriculum committee, learning how to identify, encourage and develop SGLs in order to work with and support members to do so.
5. Lack of awareness on the part of members of how rewarding being a SGL is.

All of this began to change at the end of our fourth year when program leaders realized two things: 1) for OLLI at Brandeis to thrive over time, we needed a culture shift, specifically, members needed to “step up to the plate” to become SGLs and 2) the program leaders, staff, advisory council, curriculum committee and current SGLs, needed to be proactive to make this happen.

### “Learn and Lead:” Developing LLI Course Leaders and Curricula

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In the spring 2005 semester, a program member made a simple suggestion to the director. “You should develop a course on how to develop a study group!” We agreed with her and here is the story of the “Learn and Lead” course.

The purpose of “Learn and Lead: How to Become a Study Group Leader” is to encourage and give practical input to members of the Osher Institute at Brandeis who have not yet led LLI courses and also to those members who have been study group leaders and would like to improve the quality of their course content and leadership style. The study group meets once a week throughout the ten-week semester. To date, two SGLs have co-lead the course, the program director and the Resource Committee chairperson. (The Resource Committee is a complement to the Curriculum Committee,

working to improve the pedagogy in the program with a range of activities.) In coming semesters this course will become the charge of the Resource Committee.

The following is the course description of “Learn and Lead:”

This course provides an environment for members to develop ideas for study group proposals to ensure OLLI at Brandeis will continue to thrive. Its purpose is to encourage, give practical input and assist program members who have not led courses at BOLLI (yet). The class is highly interactive with members sharing their ideas, working in both large and small groups as well as individually. Presentations by experienced and high quality study group leaders, Brandeis faculty and members of key BOLLI committees, e.g., the Curriculum Committee, are integral to the class. Members participating in “Lead and Learn” progress at their own pace as there is no deadline to complete a course proposal. Class members can continue to take the course in subsequent semesters.

The course has five objectives:

1. To inform and demonstrate that developing a course is not as formidable or overwhelming as it may seem and well worth the effort.
2. To work together to:
  - a) identify a topic,
  - b) begin the research to develop a course,
  - c) identify resource people to assist and support the development process,
  - d) structure the presentation or course (for example, develop an outline or structure for a 5 or 10-week course or a 2-hour outside presentation) and
  - e) identify readings and/or other material to use.
3. To provide an opportunity to talk about topics, and receive input and support from other class members.
4. To provide members with practical information about leading courses including how to:
  - a) structure a course,
  - b) facilitate discussion (e.g., using study questions),
  - c) manage classes so all members have an opportunity to participate,
  - d) respond to class members’ questions.
5. To provide training and assistance to use technology such as PowerPoint, overhead transparencies, online communication tools (e.g., e-boards and listservs) that, when used appropriately, may enhance the learning experience.

We believe developing a study group is a creative and iterative process involving multiple steps. A summary of the process is presented in *Figure 1. Touchstone to Course Development in a LLI*.

...the premise we were founded on was *the members are the leaders and the leaders are the members.*



Learn and Lead:  
Developing Course  
Leaders and Curricula  
in a Lifelong  
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### Figure 1.

#### TOUCHSTONES to COURSE DEVELOPMENT in a LLI

Developing a course proposal and course is a CREATIVE and ITERATIVE PROCESS. It entails researching, drafting and revisiting key dimensions over and over (and over) again.

- *Identify Your Topic:* This is a process open to change and flexibility as you do the other steps below
- *Course Content:* What do you want people to walk away from your course with?
- *Course Objectives:* Establish learning objectives and return to them as a guide as you develop the course
- *Research:* Library, world wide web, experts
- *Identify Reading Materials/Sources/Book(s), videos/tapes/DVDs*
- *Course Outline:* Weeks 1-10
- *Class Methods,* e.g., discussion, study questions, presentations, video, AV overheads, videos/DVDs, music, eboards, other
- *Throughout Learn & Lead course, continue to ask yourself:*  
Where am I in the process?  
What's working well?  
What's missing? What do I/we need to do?  
How can I make it better

#### "Learn and Lead" in the 2005-2006 Academic Year

We pilot tested the "Learn and Lead" study group in the fall 2005 and spring 2006 semesters at the OLLI at Brandeis. As is the case in many LLI in the northeast, enrollment varies significantly between the fall and spring semesters. Typically, fifteen to twenty percent fewer people enroll in the spring semester as many of our members are "snow-birds" visiting warmer climates in the winter-spring months. This variation had an impact on the Learn and Lead course as well as the rest of our program.

Table 1 provides data about the number of OLLI members who registered for and completed "Learn and Lead" in its first two semesters as well as the number of course proposals completed, submitted to and approved by the Curriculum Committee. In two semesters, approximately a dozen new study groups and more importantly, new *leaders*, have emerged from within our membership.

Table 1: "Learn and Lead" Study Group—Quantitative Information about Course Experience

	Fall 2005	Spring 2006
# Members Registered at Semester Start	24	8
# Members Completed Study Group	21	2
# Study Group Proposals Completed and/or In Process	12	1
# Study Group Proposals Approved by Curriculum Committee	10	1

The following represents a partial list of study groups that have come out of “Learn and Lead:”

- History and Culture of Wine in the United States
- The Game of Politics
- Building The U.S. Constitution: Searching The 1787 Debates of The Founders for The Original Intent Of Their Design For Our Unique Federal Government Structure
- The Mozart-Da Ponte Operas: A Guided Tour
- Who’s Afraid of 20th Century Music?
- Economics of the United States
- Understanding And Enjoying Wagner’s “Der Ring Des Nibelungen”
- Around the World in Ten Weeks: Progress and Problems in Developing Countries

While only one study group came out of Learn and Lead in the spring 2006, it is a course in the one area OLLI at Brandeis has an enormous demand and virtually no supply, i.e., fine arts. The study group, *Art: A Visual Sampler*, will be led in the fall 2006 semester by a new OLLI member who participated in Learn and Lead her first semester in the program. This one course is a big and potentially important outcome over time.

## Conclusion

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The primary goals of LLIs are maximizing members’ quality of life and cognitive vitality. High quality learning programs, e.g. curricula, lectures, and other learning models, are the heart of our programs. While creating excellent curricula is one of the most important, if not the most important, development tasks, it is also one of the most challenging. This has certainly been the case at the OLLI at Brandeis, which has completed its first six years.

The shared leadership team at Brandeis’s Osher Institute has concluded that an LLI must address this development task proactively, creatively and with multifaceted approaches to thrive over time. The “Learn and Lead” study group at the Osher Institute at Brandeis is one method with promising results. Clearly, there are other effective methods and models to facilitate the development of course leaders and curricula in LLIs. As for each developmental task in lifelong learning institutes, leaders of each program must determine the methods that are the “best first” for their program. Based on the positive experience and outcomes at OLLI at Brandeis, we urge leaders in other programs to consider, develop, and implement other models and/or use this one as a basis for experimentation.

## Reference:

Cohen, G. (2005). *Purpose, potential, and productivity in later life: a 21st century retirement study*. Project Report. Funded by Atlantic Philanthropies. [http://www.gwumc.edu/cahh/pdf/ret\\_study\\_subjects.pdf](http://www.gwumc.edu/cahh/pdf/ret_study_subjects.pdf)

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**Sharon Sokoloff** is the director of the Osher Lifelong Learning Institute at Brandeis University. Previously she did research, policy making, and consulting in long-term care gerontology and health care quality and practiced physical therapy. Sharon received her Ph.D. in social policy from the Heller School at Brandeis University, a master of science in gerontology, and master of public administration from the University of Southern California, and a bachelor of science degree in physical therapy from Ithaca College.

**Myrna Cohen** is the chair of the Study Group Leader Committee, a complement to the Curriculum Committee, and the volunteer coordinator at the Osher Lifelong Learning Institute at Brandeis University. Most of her professional work has been teaching, mentoring, and teacher training. Myrna retired from the Newton (Massachusetts) public schools in 2003. She received a bachelor of science degree from Boston University and a master of education degree from Lesley University.

## Three Poems from Suite for Lifelong Learning

**Samuel B. K. Chang**

### **Lifelong Learning: Psychology 16**

Will Rogers, interpreter of dreams,  
Like some Old Testament Joseph you can make  
Sense of things that are not what they seem  
To us in dreams when we from slumber wake.  
You draw from each minute detail  
We can recall in sleep the night before.  
Each fact disclosure marks a trail  
That leads to meanings one cannot ignore.  
Well-versed in theories of Adler, Freud, and Jung  
Insightfully you'll choose the right approach  
Unraveling the mysteries that have sprung,  
Teasing out significances beyond reproach.  
To us the uninitiated you'll be bringing  
To light significances of our dreaming.

### **Lifelong Learning: Literature 1**

The countless two-hour classes you have spent  
In teaching us the uninitiated  
The plots, the nuances and the contents  
Of Mr. Shakespeare's plays that we have read  
Have not rewarded you in money sense.  
But please believe that you have given us  
Far more than ever we can recompense  
With lucre filthy or gold of Croesus.  
Accept instead with our profoundest thanks  
This meager offering, nevertheless,  
Which represents best wishes of our ranks,  
Our high esteem and fervent gratefulness.  
So long as we can hear and we can read  
Dave Johnson's class is classic class indeed.

**Lifelong Learning: Literature 2**

Teacher of poets metaphysical  
In ten long sessions you have looked upon  
A lot of faces, somewhat quizzical.  
Betimes, however, there will come a dawn  
And light will glister on the meaning of  
Language, which through its succinct expression,  
Lofty metaphors on life and of love,  
Apprising of spirit's and sensation's  
Nexus, raising their connection not in  
The abstract; instead, making clearly known  
In real life experience the union  
Now of lovers whose joining is full blown.  
Each in class the concept of conceit shall find  
By course's end firmly affixed in mind.

**Samuel B. K. Chang** is an avid OLLI student and author of *Suite for Lifelong Learning*, a collection of poems about the University of Hawaii at Manoa OLLI. Samuel is the retired director of the Legislative Reference Bureau, State of Hawaii, and holds a B.A. degree in political science from the University of Hawaii at Manoa and M.B.A. and J.D. degrees from the University of Michigan.

## *The Prison Angel: Mother Antonia's Journey From Beverly Hills to a Life of Service in a Mexican Jail*

By Mary Jordan and Kevin Sullivan

Penguin Books, 2005

ISBN: 1594200564

Cloth 320 pages \$24.95

### Reviewed by Kathy Bell

Whether you are looking for a good book or an inspirational exemplar of what it means to age well, members of the Osher Lifelong Learning Institute network will find *The Prison Angel: Mother Antonia's Journey from Beverly Hills to a Life of Service in a Mexican Jail* by Pulitzer Prize-winning journalists Mary Jordan and Kevin Sullivan a compelling read. Not many of us are likely to don a homemade nun's habit at the age of 51 and commute from Ventura, California, to the La Mesa Prison in Tijuana, Mexico, much less take up residence in the prison. However, this is exactly what Mother Antonia (née Mary Clarke) did to serve persons that many of us might find despicable. According to the authors, "Suffering from poor health for a lifetime, she [Mother Antonia] has ignored her ailments, grabbed hold of her gifts, and used them to do extraordinary things. She is the happiest person we have ever met." (p. xi) As if curiosity about this woman isn't enough reason to read *The Prison Angel*, the book itself is a page-turner. It grabs the reader and leaves one with a new experience of what it means to be happy and engaged in life as one approaches one's eighties.

As the book aptly illustrates, Mother Antonia intuitively knows the principles of leading a meaningful life as put forward by Martin Seligman, Ph.D. in his book *Authentic Happiness*. She uses her strengths and virtues in the service of something that is larger than herself. One of her strengths is simple kindness. In her own words, "Kindness is a visit. A smile is a visit. Reaching out and holding somebody's hand is a visit." (p. 61)

Other strengths of Mother Antonia's that are evident and which she uses to assist the prisoners are forgiveness, justice, bravery, creativity, spirituality, and the capacity to give and receive love. However, beyond her own strengths, she is able to enlist the assistance of others through her determination and vision. Mother Antonia recognizes that each person has a different set of strengths and that these can be used for a greater good. Her story gives us an opportunity to reflect on our own strengths and how we might use them to contribute to society.

*The Prison Angel:  
Mother Antonia's  
Journey From Beverly  
Hills to a Life of Service  
in a Mexican Jail*

For Mother Antonia, life was “not a series of green lights.” (p. 13) She was twice divorced and as she sought acceptance by the Catholic Church, she found that older women and divorced men were banned from joining religious orders. To remedy this situation Mother Antonia founded a religious community where older women can do meaningful work on behalf of others. This community, which received a papal blessing, in many ways illustrates the concept of service learning. Mexicans and Americans have joined Mother Antonia’s “Servants of the Eleventh Hour” to assist with her ministry in the Tijuana prison. Mother Antonia feels that “Anyone can do it. There are so many things people can do. It doesn’t have to be enormous. It’s the little things. Anyone can make a sandwich.” (p. 225) After reading this book you, too, will think about the difference you can make in the lives of others.

**Reference**

(2002). *Authentic happiness: using the new positive psychology to realize your potential for lasting fulfillment*. New York: Free Press

For three decades **Kathy Bell** has been educating people on psychological topics including life planning and aging well. She holds a Ph.D. degree in social and developmental psychology from the University of Virginia, has been a faculty member at several institutions of higher education, and has served as a project coordinator and instructor for the Osher Lifelong Learning Institute at the University of Utah. Kathy has published numerous empirical articles on interpersonal relationships and communication.



## Storycatcher: Making Sense of Our Lives Through the Power and Practice of Story

By **Christina Baldwin**

*New World Library, 2005*

*ISBN 1-57731-491-3*

*Hardcover 252 pages \$22*

### Reviewed by **Robert Atkinson**

Christina Baldwin has been writing about writing personal stories for 30 years. *Storycatcher*, an inspiration-packed volume of how to express what is most meaningful to us, brings her engaging work to a new level. Many of her own personal stories serve as a framework and model for how to mine the most memorable moments and movements of our lives and mold them into narratives that we can share, learn from, and use to teach each other about who we are and what we have done in our lives.

“Storycatchers” are “people who value story and who find ways in the midst of everyday life to practice storytelling.” (p. 30) They signal, through this activity, that something of significance is about to happen, they help shift us into a narrative mode, as well as a listening mode, which makes us aware of structure, plot, and purpose. Storycatchers believe that the “ordinary stories of our ordinary lives have extraordinary gifts encoded within them” (p. 31) for both the teller and the listeners.

Though written for all age groups, *Storycatcher* reaches back to and beyond the origins of gerontology to illuminate further a topic of increasingly popular interest—the natural process of reviewing and reflecting on our lives for greater meaning and understanding. This book should be of keen interest to lifelong learners who are already familiar with the power of stories as well as to those who want to become more familiar with this tool for gaining insights into life experience.

The book is built upon three premises about story: how we make our experience into story determines how we live our personal lives; what we emphasize and retell in our collective story determines whether we quarrel or collaborate in our community; and, what we preserve in larger human story determines what we believe is possible in the world. Thus, storycatchers have an essential role to play in the world; they come forward “whenever we are in crisis to remind us who we are.” (p. x-xii)

Each chapter in *Storycatcher* is organized around a fascinating tale—about people, family, or community—intertwined with practical instructions about the nature, function, and practice of stories. The topics of the ten chapters range from how story connects us, why we make story, creating a story of the self, how story heals family heritage, how story shapes the spiritual dimensions of our lives, to, taking our place in the order

Stories can connect across difference, and can enable us to empathize and understand better the lives and circumstances of others.

Storycatcher: Making  
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of things. The author's own stories, and her many evocative examples of how to get at our own, do serve well to bring forth our deepest tales. Good stories are the flesh that gives meaning to emotions, from sadness to joy, from complacency to surprise, from hate to love. If our emotions are who we really are, stories are what give them a context, enabling us to pull meaning from both.

Stories can connect across difference, and can enable us to empathize and understand better the lives and circumstances of others. Stories document change and can help to explain, clarify, and codify the sometimes overwhelming range of changes we go through in life.

Perhaps the most compelling point of the book is that storycatching is a modern movement. The author demonstrates well how memory and imagination can merge to not only heal ourselves but change the world around us at the same time. She shows how new stories can lay the framework for a new world. The book passionately calls for humanity to hang on to its voice, its love of reading and writing, and its understanding that story is our soul. To help facilitate this movement, Christina Baldwin has developed a Web site—[www.storycatcher.net](http://www.storycatcher.net)—for “building the Storycatchers network.” (p. 233)

Beyond this, we can be assured that the stories we tell about ourselves will become the legacy we leave for the world to remember us by. “This is all that will survive of us: the stories of who we are.” (p. 21)

**Robert Atkinson** is professor of human development and director of the Center for the Study of Lives in the National Resource Center of the Osher Lifelong Learning Institute at the University of Southern Maine. He is associate editor of *The LLI Review*.

## Adulthood: New Terrain

**Edited by Mary Alice Wolf**

*New Directions for Adult and Continuing Education No. 108*

*Wiley Jossey-Bass*

*ISBN 0-7879-8396-9*

*Paperback 112 pp. \$29*

### Reviewed by E. Michael Brady

This volume, the 108th published in the Jossey-Bass quarterly series entitled *New Directions for Adult and Continuing Education*, while small in size offers a number of large and important ideas about changing views on adulthood and ways adult educators may respond effectively to contemporary adult learners. The overarching question to which contributing authors responded was, "How and when do transitions occur in adulthood, and how might practitioners provide safe environments for learners who must risk new ways of seeing the world?"

Nine chapters written by experienced educational practitioners explore the nature of adult transitions, the psychological phenomena connected to change in adulthood, learning experiences which challenge adults to achieve their developmental potential, and cultural and spiritual factors that support learning.

The first chapter written by Sharan Merriam, a well-known luminary in the both mainstream adult education and educational gerontology, gets *Adulthood: New Terrain* off to an excellent start with a review of scholarship related to transitions in adult life and the relationship between life transitions and learning. One of the core questions Merriam addresses is, "How is it we learn from some life events and not others?" This 10-page chapter represents one of the most cogent and efficient reviews of learning and human development that I have read.

While not a book written specifically for members of the burgeoning Lifelong Learning Institute (LLI) movement across the United States and elsewhere, there are important issues raised here that relate to the education of seasoned adults. For example, in a chapter written by Christina Booth Butler, a consultant in the design of educational activities for older persons practicing in Ohio, the issue of chronological vs. functional age is explored. The author quotes a famous line from the late great Negro League baseball player Satchel Paige: "How old would you be if you didn't know how old you were?" In an era when the life course is being interpreted far more flexibly than ever before, an individual's chronological age reveals little about capabilities, state of health, level of active engagement, or capacity for learning. A related idea is that of the cyclical view of life.

Regardless of how old and experienced we may be, rapid changes in society require every adult to deal constantly with new ideas, systems, and ways of thinking.

## Adulthood: New Terrain

Unlike the traditional linear view of the life course that is predicated on the unfolding of transitions according to a social timetable, the cyclical view is more open and fluid. Working with the research of Frederic Hudson, Butler discusses the core concepts of stability (“life chapters”) and change (“life transitions”) and how these relate to adult learning. A related idea that I found particularly compelling is of “beginnerhood.” Regardless of how old and experienced we may be, rapid changes in society require every adult to deal constantly with new ideas, systems, and ways of thinking. “Adult educators will do well to share the idea...that perpetual beginnerhood is normal and desirable in adulthood and...encompasses the real meaning of being a continual learner.” (p. 67)

This is a well-designed and nicely edited volume. Mary Alice Wolf has recruited a team of thoughtful and experienced adult education practitioners and has woven a tight and compelling book about adulthood, transition, and learning. As the editor writes in her concluding and summarizing chapter, “In understanding adults we must accept that we are fellow travelers on a journey to a forward place...In this exciting new terrain of adulthood, we learn how meaning permeates all that we do; we recognize that the facilitator of adult learners is highly challenged.... Adulthood has never looked so scary and yet so enticing.” (p. 94)

I recommend *Adulthood: New Terrain* to administrators and teachers in LLI programs who are interested in catching up on recent adult development theory and seeking ways to increase understanding and appreciation of adult learners. While not expressly written with the older learner (age 50+) in mind, most of the ideas shared in this book can be linked to the larger mission and work of LLIs. In it there are fresh ideas, summaries of recent scholarship, and inspirational stories about hard-won successes that will help to guide best practices. I found this book to be an effective and accessible professional development tool.

**E. Michael Brady** is professor of adult education and senior research Fellow at the Osher Lifelong Learning Institute at the University of Southern Maine. He is founder and editor of *The LLI Review*.

## *The LLI Review*

### **The Annual Journal of the Osher Lifelong Learning Institutes**

#### 2007 Call for Papers

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*The LLI Review* is an annual publication of the Osher Lifelong Learning Institute's National Resource Center. The mission of this peer-reviewed journal is to present original research and provide thoughtful and engaging commentary on issues related to learning among persons over the age of 50. To accomplish this goal the review publishes work by members of the OLLI national network as well as by gerontologists and educators working and conducting research in the field of older adult education.

The following submissions are welcome:

- Articles describing a completed empirical research study (maximum length = 5000 words)
- Research briefs/abstracts (500 words)
- Essays that involve a critical review of literature and/or original thought on a question or issue that is salient to mature learners but which is not necessarily based on empirical data collection (5000 words)
- Book reviews (750 words)
- Descriptions of "best practices" in teaching older adults, planning educational programs, etc. (2500 words)
- Descriptions of innovative courses and/or learning activities (2500 words)
- A personal story (memoir) related to older adult learning (2500 words)
- Brief fiction related to teaching and learning in later age (2500 words)
- Poetry (no maximum length, but brief is preferred)

Manuscripts should be prepared in Microsoft Word, double-spaced, and use 12-point font. Four hard copies should be mailed to the editor along with an electronic version of the manuscript e-mailed as an attachment.

All submissions will be read and evaluated by a panel of reviewers knowledgeable in the areas treated in the manuscript. References, citations, and the general style of manuscripts should follow APA style (as outlined in the latest edition of the *Publication Manual of the American Psychological Association*). Only manuscripts that have not been published elsewhere will be considered for publication in *The LLI Review*.

#### **Submission Deadline: January 15, 2007**

*Submit manuscripts to:* E. Michael Brady, Ph.D.  
Professor and Senior Research Fellow  
Osher Lifelong Learning Institute  
University of Southern Maine  
Bailey Hall 400-B  
Gorham, ME. 04038  
mbrady@usm.maine.edu

To discuss a manuscript idea beforehand and/or to otherwise communicate with the editor, please send an e-mail to the above address or call (207) 780-5312.

## Osher Lifelong Learning Institutes

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The first Osher Lifelong Learning Institute (OLLI) was started as Senior College at the University of Southern Maine (USM), in Portland, Maine, in 1997. In 2001 it was renamed after the Bernard Osher Foundation made a generous gift that enabled the program to expand its peer-taught courses and other activities for adult learners, ages 50 and over. The Osher Foundation has now funded more than 90 Osher Lifelong Learning Institutes on campuses of colleges and universities from Maine to Hawaii. No two institutes are alike; each provides a distinctive array of courses and activities for seasoned adults interested in learning for the joy of learning.

In 2004, the Osher Foundation designated the Osher Institute at USM as the National Resource Center for Osher Lifelong Learning Institutes. The national center facilitates the exchange of information, solutions, and experiences among institutes throughout the country. It publishes this journal, plans an annual conference, and provides a number of ways that the OLLIs in the network can connect with one another.

[www.osher.net](http://www.osher.net)

## The Bernard Osher Foundation

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The Bernard Osher Foundation was founded in 1977 by Bernard Osher, a respected businessman and community leader. The Foundation seeks to improve quality of life through the support of post-secondary scholarships, lifelong learning institutes, integrative medicine programs, and—in the San Francisco Bay area and the state of Maine—arts, cultural, and educational institutions. The Honorable Barbro Osher, Consul General of Sweden in San Francisco, chairs the Foundation's Board of Directors.