

# The **LL** Review

Volume 2

Fall 2007

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 Volume 2 of *The LLI Review*

**W**e made it to our second year and second edition! While many nascent projects struggle to survive beyond their inaugural year, this was not the case with *The LLI Review*. We have enjoyed generous support from the Bernard Osher Foundation and substantial interest on the part of OLLI programs and other lifelong learning institutes across the United States. So I am pleased to report that, thanks to this momentum and assistance, producing this second edition of our national journal was relatively trouble-free.

Over the past year we have received positive feedback on *Volume 1*, which was born last fall. (Our goal from the beginning was to publish once per year). Readers in the United States, Canada, and Europe have commented how *The LLI Review* has been accessible, useful, and enjoyable. One correspondent wrote how, despite being brand new, our journal felt comfortable and familiar, “like spending time with an old friend.” We continue to hear that this publication of the National Resource Center of the Osher Lifelong Learning Institutes is filling a need that other journals and magazines are not, focusing exclusively on issues related to lifelong learning institutes and older adult education. We continue to like the maxim that we have placed on the journal’s cover: “Explorations by and about older learners.” These six words continue to describe best what *The LLI Review* seeks to be.

While *Volume 2* involves the same range of genres as did the inaugural edition, i.e., empirical research, essays, best practices, life stories, poetry, and learning resources, we have organized these somewhat differently this year. Instead of segmenting manuscripts by type with a discrete section labeled “Research and Theory” or “Best Practices,” we have interspersed various genres throughout the journal. We think this makes for a more pleasing configuration. It’s also less artificial because, to be honest, some articles simply do not fit crisply into one category or other. However, like last year, the reader of *Volume 2* will still have the benefit of an abstract with which each feature article begins to help determine whether the piece will be of interest.

I am grateful to the entire editorial board, many of whom are directors of Osher Lifelong Learning Institutes, for reading and evaluating manuscripts. It is

not easy to review and make judgments on the work of colleagues. Without members of our volunteer board, who cumulatively spent hundreds of hours contributing their time and talent on behalf of the journal, we would not be able to call *The LLI Review* a peer-reviewed publication. I am especially indebted to my two colleagues at the University of Southern Maine who serve as associate editors and go above and beyond the call of duty in their commitment to producing a quality journal: Bob Atkinson and Rick Lamb.

Please read, learn from, and enjoy this 2007 edition of the OLLI journal. I hope you will share your print copy of *The LLI Review* with a friend and tell others about obtaining full access by way of [www.osher.net](http://www.osher.net). If you have comments about the journal or an idea for contributing a manuscript, I welcome e-mail ([mbrady@usm.maine.edu](mailto:mbrady@usm.maine.edu)) or phone call (207-780-5312). Thank you and be well.

**E. Michael Brady, Ph.D.**

*Editor*

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## Who are We? And Where are We Going?

Kali Lightfoot

In 2004, the Osher Foundation endowed the National Resource Center for Osher Lifelong Learning Institutes at the University of Southern Maine. The proposal we submitted to the Foundation was based on the activities of the Elderhostel Institute Network, the only existing model of a network of lifelong learning institutes (LLI), and on my experience managing national and international networks of education providers. Below is a selection of text from the initial proposal. This describes our vision at the time:

### Vision:

*A center to provide leadership in creating resources, education, and communication opportunities for Osher Institute staff and volunteers nationwide. The work of the center will mature and evolve in response to the maturation and evolution of the Osher Institutes themselves and their needs. At its most basic, the center is a central location for information and resources about Osher Institutes and older adult education in general. The Center is not a governance or policy body so much as a center for excellence and dissemination of "best practice" models and information.*

*The Osher Institute staff and volunteers do not need "training" per se, but they do need orientation to the work of Lifelong Learning Institutes and to managing an educational organization within a university bureaucracy which in many cases boasts a mixture of paid staff and volunteers. The leaders need forums to share their LLI organizations' accomplishments and talk about their struggles. The very structure of the Osher Institute movement has created many pathways to success as the Foundation funds a whole array of different and exciting models.*

When you create an LLI, you create a group of empowered, experienced older adults coming together on a common project. You create pride and community. The national Osher Institute Resource Center is intended to be a way for these groups to share their experience with each other and with the wider world.

When you create an LLI, you create a group of empowered, experienced older adults coming together on a common project.



## Who are We? And Where are We Going?

Here is a list of basic features and activities of the Osher Lifelong Learning Institutes' National Resource Center:

1. Create and manage Web site, [www.osher.net](http://www.osher.net)
2. Materials bank
3. Professional development workshops
4. Biennial national conference of Osher Institutes
5. Osher Institute pre- and post-conference meetings at selected national conferences (e.g., American Society on Aging, National University Continuing Education Association)
6. Web-based and distance education courses
7. Visiting Scholar program and other possible exchanges among Osher Institutes. Also demonstration programs.
8. Domestic and international travel
9. A national journal to share research, best practices, and other explorations by and about older learners

Although we have been in existence as a National Resource Center for less than three years, we have researched, initiated, or accomplished all of the activities on our list. And probably more to the point, we have learned that we aimed too low. We underestimated the power of a network of university-based lifelong learning institutes and the thirst for connection that existed among them.

We have learned in our three years that the biennial conferences need to be annual. And that for the time being anyway, the conference is one of the most important and effective things that we can do. Thanks to the incredible generosity of the Osher Foundation, we have been able to bring together two representatives from each institute once a year to share ideas, achievements, and challenges with each other. One of our conference attendees this year said it best:

It was very different from the academic conferences we typically attend: 'experts' presenting papers and the other experts in the audience trying to find weaknesses in the research, thereby proving who is the more expert 'expert.' The OLLI sessions seemed to be quite the opposite: knowledgeable individuals sharing information with equally knowledgeable individuals followed by a sincere exchange resulting in more knowledgeable individuals.

Our vision for the near-term future of the OLLI network includes an exploration of online learning and its possible role in OLLIs; instituting some form of collaboration among OLLIs around the management and marketing of travel programs; an e-newsletter and other exchanges of information on a regular basis, and perhaps a nationwide designation of OLLI membership. And of particular interest and excitement are a few special projects that are evolving. A small group of OLLI directors has been meeting to think about science education for older adults. And another group is talking about "civic engagement" programs.

It is always exciting to be part of a new initiative, especially one that has the

support to succeed. And being part of the national OLLI network is an opportunity to participate in an organization that is brand new in the field of aging. There is nothing else like it and its potential to innovate on behalf of its membership is mind-boggling.

**Kali Lightfoot** is the executive director of the Osher Lifelong Learning Institutes' National Resource Center located at the University of Southern Maine. Kali has over 30 years of experience planning and managing programs for older learners.

# Lifelong Learning in a Postmodern Age: Looking Back to the Future through the Lens of Adult Education

**Jean Sheridan**

## Abstract

*The field of lifelong learning is often placed in a continuum with adult education, and this is appropriate. However, there are major distinctions to be made between the two. The needs of the typical student enrolled in lifelong learning programs today are different from those of most adults in public school adult education and other settings, and the desired outcomes are different as well. This essay explores the literature of adult education, along with more general educational research and theory, in search of parallels and helpful lessons. It also examines education in a postmodern age with its demand for collaborative and democratic practices in the classroom, in this case, the content-driven classroom. The future of lifelong learning programs is examined in light of general education reform movements within host institutions and the perceived needs of new generations of students who will be enrolling.*

## Introduction

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As lifelong learning institutes look toward the future, it is essential to abandon early assumptions regarding what students expect and to face and embrace new realities. One of these realities is that the traditionally educated student will be replaced gradually, and then rapidly, by students whose introduction to schooling has been more progressive. This first wave, famously known as “Boomers,” will have a dramatic impact on enrollment (Lightfoot, 2006, p. 2). Holding the interest of these new students and continuing to attract them is of critical importance to lifelong learning institutes if they are to survive and thrive.

With the Information Age well launched, the demand for content-driven courses will continue to build. Concurrent with this is the growing postmodern consciousness that positions the individual squarely in the midst of her social and cultural environments, with private, local, and national loyalties giving way to an identity that is borderless. This postmodern awareness has been prevalent for several decades in higher education and is reflected strongly in the new general education guidelines and principles that are being developed nationwide. At the University of Southern Maine (2004), for instance, the “Vision Statement of the

General Education Council” for the new *General Education Guidelines and Criteria* included the following statement: “General education at USM is a coherent, integrative, and rigorous liberal education that will enable our graduates to be world-minded, intentional, life-long learners.” Among the values to be instilled are: an understanding of the natural world and human cultures, the ability to think in complex terms, the ability to communicate effectively, an awareness of what it means to be active citizens, the development of an ethic regarding critical issues in local and global communities.

Lifelong learning institutes that are hosted by colleges and universities would be well advised to take note of these documents and to create or adjust their own mission statements accordingly. One possible adjustment, and the subject of this paper, is how classroom culture and methodology, specifically methodology in content-driven courses, ties in with the stated goals of general education reform statements. At this time, the predominant method for delivering content is the lecture, interspersed with or followed by discussion. Other more progressive and collaborative models, however, are promoted and practiced in the broader field of adult education and, indeed, throughout the entire spectrum of formal education. I will consider some of these practices, including collaborative learning, discussion (and its facilitation), small groups, and writing to learn or writing-across-the-curriculum. Most recently, discussions of the democratic classroom model are appearing. Behind this concept lies the impulse to reduce or eradicate all forms of power, clearly a tightrope walk in education, where the underlying purpose is to impart knowledge to initiates by a knowledge bearer, the expert teacher. Nevertheless, many see a moral imperative here. I will attempt to make the case that adoption of these teaching and learning practices in the classroom encourages the adoption of a new social consciousness into, within, and beyond our local communities, that it is the responsibility of lifelong learning institutes to engage pro-actively in this high-minded endeavor, and that, indeed, in light of the movement toward re-visioned general education principles within higher education in general, it may be critical for their survival.

For Donald Schon, author of *The Reflective Practitioner*, classrooms are “instruments of social control” (Schon, 1983, p. 288). To agree with this assertion is to take the position that the classroom, if it is to conform to democratic principles, must demonstrate them. In such a class one would observe the use of collaborative teaching and learning methods that respect every person regardless of gender, race, or any other marginalizing indicator. In these classrooms any and all attempts to display power or to control or dominate are quickly identified and subdued. The democratic or collaborative classroom serves as a working model for the world beyond it as students adapt behaviors and practices that can be applied to other life situations. Many disagree, believing that the classroom serves no such purpose and has no such responsibility, that it is a finite entity in which the instructor has no other mission than to deliver information, the student none other than to absorb it.

In the United States, collaborative teaching styles are used extensively in elementary, middle, and high schools by trained and certified teachers. A majority of faculty in higher education, on the other hand, despite the heroic efforts of centers for teaching, are unconcerned with classroom methodology (although younger fac-

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ulty are beginning to experiment with new strategies). Instead, they perpetuate their own student experiences in which the power-focused performance model predominated. It is primarily from this well of educators (and expert professionals) that lifelong learning institutes draw their faculty for courses that are content-driven.

### Adult Education and Lifelong Learning Compared

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What became immediately apparent in searching the vast literature of adult education (Brookfield, 1995; Elias and Merriam, 2005; Houle, 1984; Jarvis, 2004; Knowles, 1970, 1990; Lindeman, 1987; Smith and Haverkamp, 1977) are the significant differences that exist between it and lifelong learning. The goals are simply very different. The intended outcomes of adult education are to equip those who have been educationally under-served or who, for a wide variety of very practical and often critical reasons, need to upgrade their skills. They are of all ages and classes, are culturally and ethnically diverse, and are often economically disadvantaged. They range from the poorest refugee who needs to learn English to the financially secure Harvard Law School graduate who needs to upgrade her skills for professional advancement. Students entering the lifelong learning classroom come with more existential goals: to enhance an already satisfying life, to satisfy curiosity, to fill leisure time, to engage socially. They are almost universally white and middle class, and their appetite for information and further education is whetted by their prior positive educational experiences. Demographics gathered at the Osher Lifelong Learning Institute at the University of Southern Maine showed a fairly even spread among age groups from 64 and under to 80 and older, with the youngest and eldest being nearly equal (Brady, Holt and Welt, 2003). (As I have noted above, "boomer" generation enrollments are expected to change these numbers significantly.)

The spectrum of adult education programs is wide ranging and includes a variety of models such as cooperative extension, general education degree programs, language learning, continuing education programs on the college and community college level, university-based professional schools, and programs in business, industry, and the military. In a literature search one encounters descriptors such as experiential learning, self-directed learning, collaborative learning, and cooperative education. The term "lifelong learning" is used to describe yet another experience on the adult education continuum and also appears in the literature of elementary and secondary education to define learning experiences throughout the life span, whereas, interestingly, the term "adult education" does not. Indeed, more than two decades ago Houle suggested that "the central conception of education in the future is likely to be that of lifelong learning" (Houle, 1984, p. 223).

Those who teach in adult education, with exceptions for business, the military, and other unique areas of expertise, are graduates of specifically designed degree programs which focus on program design, measurement, achievement, and methodology. As I have said earlier, by contrast, most faculty in lifelong learning programs, especially in content-dependent courses, are retired from the professions or from college and university teaching. They bring considerable gifts to the classroom, but, in general, have not had prior experience teaching adult or lifelong learning students (Vega and Taylor, 2005).

## Theoretical Perspectives

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As lifelong learning institutes look to improve the ways in which curriculum is delivered there is much to be mined from a study of the philosophical and theoretical groundings of the adult education movement as it has developed over time. It is an ancient and revered one; lifelong learning, once an experiment, is now firmly established. Institutions of higher education, notably Harvard and Brown, established lifelong learning divisions decades ago as a way to foster mutually beneficial relationships with the surrounding communities. There were earlier experiments in the United States since the time of Emerson and Thoreau, the Chautauqua Institution founded in 1874 being a famous example. In England and France, the University of the Third Age thrives.

Cyril Houle (1984) was one of the first in the US to explore the education of adults as something distinct and different. His delightful survey, *Patterns of Learning*, is crammed with pithy and entertaining quotations and maxims from the early Greeks to modern times and acclaims the inherent human impulse to pursue knowledge throughout the life span. Representing ever changing needs and desires, it has been, variously, a way of examining one's life, a tool taken up to learn something specific, an accomplishment, a way of preserving the state, a pleasurable activity, part of a personal rule of discipline, a mandate, a way of avoiding responsibility, an emblem of elitism, a rung on the ladder of success, a personal discipline or rule of life (p. 173–186). In short, adult education reflects the visions and mores of each time as each succeeding stage of history “finds ways of using these ancient processes..., putting them together in new ways [while] adding refinements” (p. 191). For Houle, the apex of this continuum is achieved in what he calls “self-directed study” or “individualized self-teaching” (p. 191). He envisions this ideal under a number of guises, including student-initiated study or “mutual instruction” groups, peer tutoring, discussion circles, “master-teacher” relationships, “scholarly companionship,” and the formation of monastic-like study communities (p. 190–198). (It is tempting to draw parallels between this and today's lifelong learning programs. Indeed, how pleasant it would be to explore ways in which Houle's examples could be replicated in present time curriculum planning. I was reminded of this when I read a description of the course “Renaissance Lessons for Today” taught by Diane Dreher at Santa Clara University's Osher Lifelong Learning Institute in Volume 1 of *The LLI Review*.)

Houle's visions and ideas contrast dramatically with later theorists and practitioners in the field of adult education who have decidedly more pragmatic goals. In reality, there is a grittiness in the field that is driven by the needs of those who typically seek out education as adults. The vast majority are motivated by very practical previously unmet needs. Unlike the ideal man whom Houle follows in his scan of history, these real time adults are in no position to use education as escape or amusement or to retreat into study circles in remote idyllic locations. However, much of what he describes as the ideal student in the ideal educational setting does apply to the lifelong learning experience of middle class Americans.

As Smith and Haverkamp (1977) point out, the needs of adults in the typical adult education program are similar to those of the average freshman college student. These needs, first articulated to a broad audience by Malcolm Knowles (1970, 1990), include, among others, the ability to formulate questions, to toler-

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ate ideas that vary with what has been previously assumed, to determine what learning is essential and what is not, to locate what is necessary, to choose appropriate sources, to organize acquired data, and to integrate this with prior learning. Students entering the lifelong learning classroom are already in command of these skills.

It was Malcolm Knowles (1970, 1990) who brought the term “andragogy” into adult educators’ lexicon, although Stephen Brookfield has attributed that unique honor to social philosopher Eduard Lindeman (Brookfield, 1987, p. 9). Andragogy, which is a methodology more than a theory, operates under the assumption that adults learn in unique ways and not as children do. Because adults bring life experience, self-direction, readiness, and a mature problem-solving approach to learning, changes need to be made in the ways in which information is delivered to them. Knowles (1970, 1990) promotes an interactive student-driven classroom in which content is embedded in activities designed to engage students cognitively, emotionally, and socially. The trained adult educator creates the learning materials and facilitates the process; she is also cognizant of her teaching style and of her students’ learning styles. She works under the assumption that the nature of their shared endeavor is collaborative.

In recent decades few if any adult educators have had more influence than the Brazilian educator Paulo Freire (1970, 1973, 1978), who lived from 1921-1997. Given the mandate to eradicate illiteracy among the rural peasant classes, he created a unique classroom methodology and culture. In his literacy classrooms, the student/teacher relationship was revolutionized; students were given the right to choose what it was they needed to learn, and the teacher’s role was redefined and redesigned to facilitate that learning. Such a radical shift in what and how one learned naturally transformed his students who were socially, culturally, and economically marginalized in the stratified Brazilian society of the time. Regardless of the unique situation in which he worked, Freire’s methods and theories, when he began to proclaim his gospel from his own margins after being exiled by a reactionary government, touched a universal chord. At Harvard and elsewhere around the globe he became the darling in progressive education circles.

Freire is rightfully characterized as a Marxist/Christian, and his theories and praxis belong in the radical school of educational thought. It is unquestionably political in nature and asserts implicitly and explicitly that the classroom is in full relationship with the social and cultural environment within which it operates. In time, his intuition about the behavior of all disadvantaged populations in alien educational settings, and their perception of education as a privilege of the dominant classes, was folded into feminist thought by such luminaries as Mary Belenky et al. (1997) and bell hooks (1994). After Freire, the link between what transpires in the classroom and the world that students enter when they leave had been made and would thereafter never be broken.

It is well to note that theory regarding learning in general and education in particular universally begins in studies of children, and none is better known in this country than John Dewey (1916, 1938), the father of progressive education. In his preferred method a problem is proposed to the student, who then examines it using resources provided by the teacher. It is the teacher’s role to set up the experience and facilitate the process, and it is the teacher, of course, who must be in command of

the material. As with other theorists in education, Dewey's work has been applied mostly in lower and secondary education. In adult education, however, his influence has been deep and long lasting and has inspired the contributions of such stars in the field as Lindeman (1987) and Knowles (1970, 1990).

The influence of Lev Vygotsky (1962), a Russian psychologist, has also been enormous. Vygotsky died in 1934, leaving a vast amount of research, but it was only in the late 1970s, when his 1962 book *Thought and Language* was translated, that his theories became widely known. It is his premise that children advance to new levels of learning through play, the use of the imagination, and social interaction with peers and authority figures. Having integrated content in this way, they reach a level of comprehension in which they themselves are able to construct new meaning and knowledge. From his initial empirical studies came a new awareness of the importance of social factors in the learning process (Lee and Smagorinsky, 2000, p. 4; John-Steiner and Meehan, 2000, p. 42). Vygotsky's work also inspired the intensive use of writing as a learning tool. Subsequently, the process writing, writing-to-learn, and writing-across-the-curriculum movements came into being. A fourth component, following play, social interaction, and the uses of language, concerns the interrelationship between students and the social and cultural environments in which they live. Vygotsky, prefiguring Freire, asserts that a mutuality between the classroom and the world outside exists in ways that are both subtle and overt.

Certain implications follow. The classroom is a community, and as such all members—teachers and students, students with other students—work together in joint activity. The best of these activities involve the whole person and engage the senses and the emotions as well as the intellect. Learning experiences should be creative and interesting. By demonstrating how knowledge is constructed, an individual can add to what is learned in any given lesson (Wells, 1999, p. 60–61). Therefore, outcomes and goals are not the end and “less” becomes “more.”

Of persistent interest in progressive educational practice is the concept of the democratic classroom. Hardly radical or new, it has roots in the philosophies of Emerson and Dewey among others. Eduard Lindeman (1987) tirelessly promoted it in the field of adult education, undoubtedly as a result of his early experience in “the school of hard knocks,” and he expounded on it in an impressive output of writing reviewed in Stephen Brookfield's *Learning Democracy: Eduard Lindeman on Adult Education* (1987). In the laudatory preface Brookfield, himself renowned in the field, notes that among Lindeman's major concerns is the “belief that adult education was a force for constructive social action” (Brookfield, 1987, p. 4). What is of particular interest here is his firm belief that the classroom should model democratic principles and practices. He criticized formal educational methods which merely recited from the teacher's repository of knowledge, Freire's “banking method.”

## Discussion

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From the previous, admittedly selective, literature review, I draw the following conclusions. While lifelong learning students share the same skills and can-do attitudes with the typical, more practical-minded students enrolled in formal adult education programs, in most content-driven lifelong learning classrooms the meth-

The trained adult educator creates the learning materials and facilitates the process; she is also cognizant of her teaching style and of her students' learning styles. She works under the assumption that the nature of their shared endeavor is collaborative.



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ods and teaching/learning strategies developed and promoted by Knowles (1970, 1990) and his successors are not employed. Expert faculty, either disinterested in or unaware of the full range of methodologies available to educators, fail to recognize the adult student's impulse to drive the material and to process it in a problem-solving way, and, instead, get in the way of authentic learning by lecturing on the subject and expecting their students to be passive learners.

What we have come to understand about teaching in general and teaching styles in particular is that they, first of all, reflect the underlying philosophies of the times. Today, we are in a time between times, when "modernist" theories that evolved from the Enlightenment are gradually (now rapidly) being replaced by those coming out of a postmodern sensibility, which I will discuss later. Rational thought demands measurement and specific outcomes, thus education's historic fascination with tests and quizzes and grades and standards and textbooks, all of which reduce learning to a common denominator. It is no surprise that the apex of the teaching methodologies of the modern period is the ubiquitous PowerPoint presentation, "almost as if the technology has assumed a greater importance than the content or the teachers and learners" (Jarvis, 2004, p. 193).

But is not the well-designed (and sometimes audio-visual supported) lecture a prefiguration of the technologically driven PowerPoint presentation? And does not the expectation that the teacher be popular and a performer, as well as an endless well of information follow from that? ("All eyes focus here.") The cult of the teacher still rides high in many post-secondary classrooms, including the lifelong learning classroom. Indeed, these qualities in a teacher are highly honored and desired. Results of a recent poll at the Osher Lifelong Learning Institute at the University of Southern Maine, for instance, showed that for a large majority of students this is their preferred classroom model (Collins, 2006, p. 8). This "best teacher" model is in direct conflict with Freirian thought, which claims that a teacher who dominates by force of personality speaks, even if unwittingly, for the power class. Many can remember the once domineering and sometimes harsh teacher, now replaced by the benign and entertaining one—eloquent, witty, amusing. The effect, however, is the same and renders the student's learning a by-product of the main attraction, the articulate teacher/performer. (I call this the "John Barrymore Effect.")

Consider instead a scenario in which teachers and learners interact equally in a relationship based on respect and mutuality. Both understand the nature of the engagement, in this case the intake of knowledge, and both recognize the responsibility of the other: the teacher to be in control of the material and to facilitate the process through which it is delivered, the student to cooperate in this effort. In this classroom setting, which builds on the work of Carl Rogers (Elias and Merriam, 2005), the teacher and student share responsibility for co-creating the learning experience. (I have observed a number of children come up through the grades, and nothing has impressed me more than seeing this contract-driven, project-oriented methodology at work, clearly promoting positive responsible attitudes.) Stephen Brookfield nudged this forward in what he calls "a transactional drama in which... participants and facilitators... interact continuously to influence the nature, direction, and form of the subsequent learnings." (Brookfield, 1987, p. viii).

The teacher who would be reflective and responsive will "ground [his] practice in core democratic values such as justice, fairness, and compassion" (Lindeman,

1999, p. 44). Such a learning environment allows for active participation, avoids textbook-dominated (and I would add lecture-dominated) instruction, encourages reflective thinking, gives students power to make decisions, and respects all students (Kubow, 2000, p. 9). Students are enabled to learn by way of shared activities based on readings, problem-solving groups, peer evaluation, and small group discussion (Thayer-Bacon, 1996; Vega and Taylor, 2005). In such an environment the focus shifts from being teacher-centered to learning-centered, a culture of collaboration is constructed, and students assume responsibility for their learning, the better to retain the material. (It is generally understood now that the one who learns best from a lecture is the lecturer herself). In effect, a real-life experience is designed, giving students the opportunity to develop the skills for cooperative problem-solving behaviors beyond the classroom.

Classroom culture and methodology have changed significantly as a result of the enormous acceptance of these theoretical perspectives. These include learning in groups, collaborative learning, process writing, writing to learn, and writing-across-the-curriculum, among others. Attention has also been drawn to the fact that not all students learn the same and that adjustments should be made to accommodate these differences. Thus, says Jarvis, "it is necessary to consider not only the aims, methods, and content of a particular teaching session, but also the teaching style and the morality of the approach in relation to the participants in the process" (Jarvis, 2004, p. 189).

The groundbreaking work of Howard Gardner (1983) upended traditional assumptions about how students learn and speaks to this "morality of approach." His theory of "multiple intelligences" challenged the time-honored belief, widely accepted since the Greco-Roman era, that the only way to integrate new knowledge or information was through mental activity, with reading and writing highest on the list of intellectual skills. More millions than can be comprehended have suffered as a result of this discrimination. Now there is general agreement that, while many do learn best through reading and writing, others comprehend better in a variety of alternative ways, some by using mathematics, logic, or spatial relationships; some through images; others kinesthetically or through music and rhythm; and still others through social interactions or inner reflection. Each of us has a preferred way. Some individuals may be able to call on any or all of these ways as called for, while, for others, only one way may be available; it is for the experienced and sensitive teacher to know.

In adult education specifically much attention has been placed on the importance of learning and teaching styles (Barer-Stein and Draper, 1994; Brady and Lampert, 2004; Brookfield, 1999; Galbraith, 2004; Knowles, 1970,1990; Sutherland, 1997). Kenneth Bruffee, writing in the 1970s and 1980s, added collaborative learning to the mix (Barkley, 2005; Bosworth & Hamilton, 1994; Foyle, 1995; Haring-Smith, 1983; Imel, 1991; Sheridan, 1989, 1990). Processing information in small group configurations is the central method employed in collaborative learning. Susan Imel (1996, 1997, 1999) has done a prodigious amount of work promoting the use of small groups in classroom teaching, and she is joined by many others, including Bouton (1983), Crane (1980), Simpson (1995), and Wang (2000).

Simultaneously, empirical research on the relationship between writing and learning by James Britton (1975) in England and Janet Emig (1971) in the US

Consider instead a scenario in which teachers and learners interact equally in a relationship based on respect and mutuality.

## Lifelong Learning in a Postmodern Age: Looking Back to the Future through the Lens of Adult Education

opened up an interest in how to use writing as a learning tool (Bruffee, 1985, 1989; Fulwiler, 1982; Maimon, 1981, 1989; Tchudi, 1986; Sheridan, 1992). Thus, the emergence of process writing, writing-to-learn, and writing-across-the-curriculum, all of which have been fully integrated into curricula throughout the spectrum (Sheridan, 1995). As time goes on, students entering lifelong learning programs will have had educational experiences incorporating many if not all of these methods.

### Conclusion

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If the medium is the message as Marshall McLuhan posited long ago, then classroom culture is also the message. The pedagogies (andragogies) briefly described above represent the effort on the part of enlightened educators to equalize power and thus to promote democracy both within and beyond the classroom. No one would argue against democracy; why then the continued resistance to classroom reform in terms of methodology? For Donald Schon a formidable reason for resistance among teachers and other experts is that it takes time to rethink and change what it is we do best, in other words, “reflection [seemingly] interferes with action” (Schon, 1983, p. 277). Action is a hedge against fear, fear that (with our instructors’ hats on) we may be paralyzed in the moment should we press the pause button and relinquish our power to the student. In that moment (without our notes) we may lose our grip on the master plan and be revealed as an emperor without clothes. Suddenly, a Pandora’s box of complicated “out-of-control” possibilities has been opened up, disrupting our game plan. Out of control, we risk paralysis and discovery, and so we retreat to the safety of traditional power-based forms, such as the lecture. To forestall this dilemma, we keep moving, “keeping on keeping on” and so retain control.

Administrators, if they are to be vigilant about maintaining the highest professional standards, need to step in to help. As is clearly stated in “Appendix 4” of the *Guidelines and Criteria for General Education at USM*, “General education requires administrative leadership” (University of Southern Maine, 2005, p. 21). One possible focus for leadership in lifelong learning institutes is to offer faculty development workshops designed to reduce resistance through non-invasive information sessions. Such sessions might include success stories from early resisters as well as opportunities to “experience” and try out some of these methods in safe, professionally run settings (Brookfield, 1995, p. 260–267; Vega and Taylor, 2005). Moving forward from administratively sponsored initiatives is the possibility of forming what Drennon and Cervero call “practitioner inquiry groups” in which faculty/ participants “act on power relationships in ways that either reproduce or transform them” (2002, p. 1). The ultimate goal is to help faculty re-vision themselves as facilitators who are co-participants with the students in the process of learning (Elias and Merriam, 2005, p. 127).

Administrators can also help by insisting on the provision of classroom features such as seminar room setups and round tables. Sitting at round tables or facing one another in a seminar configuration, students and faculty naturally enter into a dynamic in which it appears that all are sharing equally in the discovery of some new knowledge (Brookfield, 1995, p. 44; Nesbit, 1998, p. 7; Heimstra, 1991).

Colin and Heaney (2001), calling on the iconic Dewey, Lindeman, and Brookfield, seek to promote social and cultural diversity in adult education doctoral programs, an issue that is a growing concern in lifelong learning institutes. A review of a typical curriculum, however, makes it very clear that the Eurocentric focus remains dominant. In graduate and undergraduate education where students of many cultures have a voice, these imbalances are gradually fading, but in lifelong learning, where the vast majority of students are white, middle class, and older, this consciousness is presently dormant. It is impossible to force such a sensitive issue; here is a place where “affirmative action” would be ineffective as well as inappropriate. Again, administrators will need to find a way out of this dilemma. One first step might be to recruit faculty who are culturally and racially diverse.

“Deliberate ethical implications” follow from a close reading of new general education guidelines, stated Lee Kneflkamp speaking at the University of Southern Maine’s Gloria S. Duclos Convocation, *Liberal Education in the 21st Century Academy*. (Kneflcamp, 2005). One of the ideals expressed in the university’s liberal education vision statement is to “enable our graduates to be world-minded, intentional, life-long learners.” Our real-time lifelong learners are already influential members of their communities, narrow and broad, and serious about their roles as citizens, but they are no less open to formation. Lifelong learning institutes, recognizing the considerable potential of their students to be “change agents,” can help them realize that potential in overt and subtle ways.

Guidelines such as these reflect an emerging postmodern consciousness. So what is postmodernism? Despite its sometimes bad press—Would someone please explain Foucault to me? Who the heck was Jacques Derrida?—postmodernism is here to stay. And for good reason. Elias and Merriam describe modernism, to which postmodernism is a reaction, as “the many social, economic, and political systems that have developed in the West since the eighteenth century” (Elias and Merriam, p. 219). Some say it began with the European Renaissance, some say the Protestant Reformation, some say the Enlightenment. Whatever the origin, its central and continuing belief is rationalism, from which have emerged industrialization, capitalism, the cult of the institution, persistent Colonialism, and through which are perpetuated repressive power structures. Postmodernists, especially those identified by Elias and Merriam as “constructive postmodernists,” seek to replace these realities, and the resulting attitudes, with a liberating sensibility that diminishes or transforms them (2005, p. 224). This is an impossibly oversimplified definition; for a sophisticated and illuminating treatment, see Elias and Merriam (2005).

As this consciousness rises, a new type of individual is emerging, one who has a global rather than local identity, yet who views truth as relative to each unique set of circumstances; who is emotionally open, relaxed, and flexible; who is receptive to revisionist interpretations of history. This is the lifelong learning student of the future, and she will be a challenge. It’s time to get ready.

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## SOS: Seasoned Journalists Issue Urgent Call to 'Save Our Stories'

by Mary Ellen Corbett

### Abstract

*The author and her long-time journalist husband have unveiled an autobiographical writing project, "Save Our Stories," that has been in the works for more than 20 years. "SOS" is designed to capture ordinary citizens' life stories for posterity. An important aspect of this program is to team older persons with teachers and students to promote personal writing endeavors. The ultimate goal is a syndicated newspaper service leading to an international repository and databank available online, where millions of compelling accounts may be accessed to inform and enrich generations to come.*

- It is an early spring day in humid Midwestern farm country, and I tremble as I approach a modest brick bungalow in my hometown. I am following a news tip that the occupant, a retired telegraph worker, may have served as a Nazi spy during World War II. When the man answers, I will ask him about the rumors. The year is 1960. I am not yet out of my teens.
- I can almost make out the silhouette of a smallish handgun in the right pocket of the nervous visitor's khaki jacket as he politely orders me to shut up and do exactly as I am told. The man reveals startling plans to murder his wife and in-laws. He directs me to take careful notes about his motives. We are in the middle of a crowded newsroom in Compton, California, in my 22nd autumn and I am terrified.
- It is a drizzly winter noon hour and the press photographer and I reach the accident scene well ahead of emergency response teams. A frenzied adolescent yanks his hair out in clumps as he wails over his bleeding sibling, a small lad whose legs have been severed in a fall beneath the wheels of a slow-moving train. "I'm sorry! Oh, God, I'm so damned sorry!" he screams at the dazed little brother who had obediently followed him over a freight-car coupling. It is a suburban community in Southern California and I am a young mother with a son the same age as the accident victim.
- The mood is festive and the day is balmy as I am offered an iced tea on the deck of the luxury liner Canberra. Movie idol Cary Grant and his actress-wife, Dyan



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Cannon, have just arrived from the United Kingdom and are regaling me with amusing stories about their beautiful baby daughter's first ocean crossing. It is a dazzling afternoon at the Port of Los Angeles and I am 26.

- The night is hot and sticky and the sleazy neon-lit hostelry reeks of sweat and stale beer. The security chain clicks behind me and I realize I've just been locked into a flea-bag motel room with three armed members of the paramilitary guerilla warfare Secret Army Organization. The interview setting is El Cajon, California, and I am not yet 30.
- It is mud season in New England and little do I fathom, on first encounter, that the striking teenage cystic fibrosis patient before me will soon become a cherished part of my family and my future. I am instantly captivated by the coughing raven-haired beauty destined to fill the empty-nest of my 40s. Within months, Devon will call me "Mom."
- Queen Anne cherry season in Washington State finds me in mourning. I have just helped prepare the emaciated body of a beloved for burial. Once away from the oppressive cancer ward where I've kept vigil for weeks, I linger dazed and shaken in the shadow of Seattle's imposing Space Needle. It is my painful 50th summer.
- On a bright winter afternoon in a former New Mexico mining town, several days of punishing snows have at last subsided as I type these lines about my bygones. At a graying 65, I have whomped up the courage to share a few moving vignettes from my past.

I am a lifelong journalist wishing to provide personal examples of how the headlines and datelines and bylines of my incredible career have influenced my exploration of the human condition.

Yet these stories all form little more than a single silken thread in the grand tapestry of history. Each of my reportorial adventures contains another moral of another story and another urgent prompting to capture more information for more generations for more reasons. But what of the trillions of stories that are never saved for posterity, the endless worldwide narratives interred without even the simplest death notice?

### A Career Kicks Off

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I first glimpsed the power of human connections at a tender age, while eavesdropping on busy grown-ups in "the Land of Lincoln." They told and re-told the local legends: about Mother Mary Bickerdyke, who had nursed wounded Union soldiers on blazing Civil War battlefields; poet and historian Carl Sandburg, who first gulped in the wonder of life in a humble clapboard homestead on Galesburg's East Third Street; and pioneer entrepreneur George Washington Gale Ferris, who invented the world-renowned revolving amusement wheel and caused a local street to be named in his honor.

But it was not just the famous folks in the pages of *The Chicago Tribune* who intrigued me.

Early on, I developed a sense of the value of "ordinary" stories, which I began jotting down with my well-chewed No. 2 Ticonderoga pencil as soon as I could print block letters on my third-grade blue-lined foolscap. These tales concerned

souls such as our gregarious neighbor, Dottie Hipple, who delivered potato chips and pretzels to the barrooms and grocery stores of Knox County...school chum Mary Elizabeth Griffith, whose dearly departed relative, Wilhelm Roentgen, had discovered a mystery known as X-ray... refined soft-spoken acquaintance, DeEtte Hughes, who'd been a brave young nurse on Chicago's west side during the pandemic of 1918, the international death sweep that had claimed my mother's own sister, nursing grad, Diamo Besaw.

I was mesmerized by such stories. They propelled me toward the only work I ever seriously considered: a career in journalism.

I had earned my first national byline by fourth grade, printed my first type-written rudimentary newspaper before puberty, and garnered my first writing honor while still in junior high. I was promoted to state editor of my first daily before the age of 20.

Forget medicine or law or teaching or art. There was no occupation even half so intriguing to me as that of recording human events.

The excitement of those first few years cemented me in a career that held me spellbound as I covered everything from government, aviation, flood control, and crime to cultural events, school news, features, and obituaries. I was hopelessly hooked on the importance of chronicling personal happenings as a route to understanding and changing things.

But not until a snowy 1986 auto trip between Dartmouth College in New Hampshire and our then-home in Vermont, did my journalist husband, Lew Little, and I stumble upon a realization that would point us in an entirely new direction in our writing pursuits. What we came to understand as we chatted over the scenic miles on that long-ago overcast January afternoon, was that we—and all of our colleagues in the news profession—could devote every waking moment of the rest of our lives to recording faithfully people's stories, and it would still not even scratch the surface.

Every soul on the path of life questions the meaning of his or her role in the endless tableau. And as we go about the business of daily living, we all sense that our experiences have meaning and that our stories hold greater significance when shared. But how do we go about such sharing?

Who has not come to the end of a book or an article and realized he or she has personally encountered something at least as important as that just read? Who has not walked out of a theater convinced that a movie plot held far less meaning than the untold account of some friend or loved one? And who hasn't, at least once, walked quietly through a somber graveyard, studying the cold, stark tombstones and wondered what warm and wonderful histories are forever buried beneath them?

Thus, did it dawn on my husband and me, during a contemplative New England car ride 21 years back, that because there truly is a mystical sense of purpose in every living person, each individual's story is important, part of a priceless legacy with the potential to educate and inspire.

## A New Direction

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That day's professional insight prompted us to begin finding new ways to coax stories out of the masses and to perfect a series of several hundred guided interview

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questions that could lead individuals through the maze of recording their personal histories for future generations.

We understood this program had to catch fire as a grassroots movement, because our government has its preservation cart squarely before the horse. (Does it make any sense to budget millions to maintain a national registry of historic *places* without at least as much money and energy devoted to a national campaign to preserve the history of the people who created the buildings? What are mere structures without full records of the folks who designed them, built them, lived and died in them?)

In our view, it was high time for an impassioned program for saving human stories!

Consider the incalculable impact on future generations: No longer would scholars need to sift through layers of dirt and debris, looking for shards of pottery or bits of bone to piece together the past. Our generation's legacy—thanks to the astounding technology of the information age—could be a carefully recorded and well-preserved diary of the lives and times of contemporaries around the globe. Easy to access and to learn from, what better way to comprehend other cultures? Other creeds? Other persons' hopes and fears and dreams?

Imagine sitting at a computer and with a dozen basic keystrokes, being able to enter a whole new world of understanding, where we could call up collected memories on any subject by any documenting group: war veterans, captains of industry, cancer survivors, sports heroes, teachers, parents, immigrants, gay and lesbian activists, scientists and inventors, 9/11 families, entertainers, artists, clerics, financiers, stalwarts who lived through The Great Depression, anthropologists, poets, Holocaust survivors, politicians, recovering drug addicts, homemakers, abused children, champions of civil rights, philanthropists, feminists, the poverty-stricken, all together comprising a veritable archive of the trials and triumphs of men, women, and children of every age, nationality, and walk of life. Suddenly, everyone matters! Every story is an international treasure. All can be registered, cross-referenced, and reviewed in one central repository available at the tap of a computer code.

Citizens of tomorrow—if *we are willing to make the effort today*—might avail themselves of an entire priceless databank about people, trends, history, the environment, health, faith, and societal attitudes. And in leaving such a complete record of our work on the planet, we could imprint current insights and understandings upon the collective consciousness of whole civilizations to come after us.

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## We are Our Experiences

We can no more deny our stories than we can disavow our DNA. Personal life events linking us with one another are as much a part of our complex molecular structure as what scientists behold in the microscope when they gaze upon that mysterious double helix and its coiled strands of absolute wonder. All people have priceless stories to share, to stream forth in soul codes for the edification of a needy universe.

With that incredible insight, my husband and I resolved to find more meaningful ways to collect and save individual stories. This goal was to become our central focus, a project to inspire and empower us for the balance of our days.

We decided to use our non-retirement years to launch no less than a world-wide effort to amass and preserve human experiences, particularly accounts of the elderly, those folks we've dubbed our world's "endangered historians." (Example: World War II veterans are said to be dying at the rate of 1,100 per day.)

We became determined to publish books and articles and to set up a comprehensive Web site while devoting ourselves to exploration of international possibilities for gathering personal accounts, in the interest of promoting global understanding.

A mighty challenge? Yes. But one that's never been more "do-able!" Or, in our estimation, more necessary.

### First Steps

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Our experiments began in earnest with a community newspaper we founded in the desert southwest, several years ago. We determined from the outset that it would be a different publication than any either of us had worked on in our rich news careers extending from coast to coast.

We pooled our then-three quarters of a century of journalism knowledge and began a 286-week odyssey that would forever reinforce a dedication to "SOS—Save Our Stories." Today's true urgency of that acronym cannot be over-emphasized.

We started with an educational trial balloon partnered with a major corporate sponsor, the mining giant, Phelps Dodge. Children in the local school system were challenged to pen reflections on assigned topics, telling their experiences and viewpoints, interviewing their elders, outlining their beliefs. Works of one winner and several runners-up were published weekly, with certificates and cash prizes awarded. The results were amazing. The essays were heart-warming. The history was priceless.

Teachers raved about how their students' self-esteem blossomed, their writing skills improved, and their family lives were enriched as the youngsters tackled our suggested themes. Some pupils confided that their efforts interviewing parents, grandparents, aunts, and uncles were the most rewarding at-home moments they had ever experienced. And their spirited writing exercises brought unexpected pay-offs:

Third-graders at Bisbee, Arizona's Greenway Elementary wrote about hopes for a nearby hospital heliport, so their recesses would no longer be interrupted by emergency choppers forcing them off the playground. The community got involved, raised \$50,000, and made that helipad a reality.

One articulate 12-year-old girl voiced frustration about a deteriorating local park. Volunteers who read her comments immediately cleaned it up and improved it.

Many student compositions revealed the sad state of disrepair of local school facilities. A previously defeated educational bond issue subsequently passed with ease. And with that voter triumph dawned a fresh appreciation of the power of the written/printed word.

And as an initial small group of pupils shared their feelings, more readers hopped on the communication bandwagon, until we were receiving letters and touching recollections from all over the sizeable Cochise County, from elementary

Does it make any sense to budget millions to maintain a national registry of historic *places* without at least as much money and energy devoted to a national campaign to preserve the history of the people who created the buildings?

## SOS: Seasoned Journalists Issue Urgent Call to 'Save Our Stories'

students and high schoolers, to enthusiastic adults, especially senior citizens. A program which generated hundreds of entries the first year, brought in thousands in subsequent seasons. Readers instantly "got it," and grasped the value and wonder of sharing! From the devastation of losing a beloved pet to touching remembrances of war. From heartfelt condolences sent to Lady Diana's sons, William and Harry, after the princess's death in that horrific Paris car crash, to the stirring account of a local traumatized unwed mother who revealed how she'd given up her baby and then searched for decades before eventually finding her daughter again.

### Gathering Momentum

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Our project garnered national recognition, including two major literacy awards from the National Newspaper Association. It was featured in "Showcase of Excellence," published annually by the Huck Boyd Media Center at Kansas State University, which spotlights some of the best community papers in America.

By the time we began discussing what we'd tackle next in this snowballing personal history endeavor, we realized that we needed major national support, funds to set up a well-planned Internet database, publication of books and articles on the concept, and a far-reaching plan for reaching people in all corners of the globe.

Thus, the achievements of our individual journalism careers began to pale in importance when compared with the potential for saving millions of vital life stories.

\* \* \*

Before outlining specifics about hopes for our SOS project, I want to tie up loose ends from the kick-off of this article:

- I never learned if the Illinois gentleman had links to Nazi Germany. He refused to talk with this anxious cub reporter from *The Galesburg Register-Mail*, and I was too timid and inexperienced in those days to know how to press the issue.
- After posting an officer in my home, police located the disturbed husband who had made serious threats in the newsroom. He was taken into protective custody. While he admitted coming to the *Herald-American* and threatening me and others, he said he had just been distraught over the break-up of his marriage and really wanted to be understood without intending to do any harm. He was "committed for observation" and eventually assigned to a counseling program.
- The lad who lost his legs after tumbling beneath a passing freight train? He survived the tragedy and was eventually told that with prosthetic limbs, he would learn to walk again.
- My movie star interview proved to be one of my least engaging pieces—ever. The celebrities did all in their power to put me at ease, but I was a nervous wreck and my fawning article reflected that.
- The exposé on the Secret Army Organization earned me a pipeline into the West Coast underground, whose members considered my coverage "fair and objective." I refused to divulge my sources to authorities. Readers were stunned by my revelations. Press award judges lauded my series, while friends insisted my risk-taking had been "absolutely insane."
- The teen with the terminal illness became the subject of an investigative piece I

wrote for *The Buffalo* (N.Y.) *Courier-Express* and *The Burlington* (Vt.) *Free Press*. She obliterated my objectivity and won my heart, eventually joining our family circle and living a full decade past her life expectancy, as she taught us monumental lessons about faith and love.

- And the cancer patient in Washington State? He was my former husband and lifelong friend, pilot Harold Corbett, whose passing left a void that more than 15 years later still defies description.

\* \* \*

Which brings me to my sixth decade and today's determination to use my remaining years as a writer in a project to eclipse even my most exciting bylines of years past. Compelling as were our prior press experiences, my husband and I now see and appreciate the potential impact of far wider and more ambitious documentation than anything either of us has covered in our long press careers. Lew, age 73, the man who discovered "Garfield," cartoonist Jim Davis's famed comic strip cat, is determined to apply his 30-plus years of successes in newspaper feature syndication, to bring our Save Our Stories project to fruition.

### Support Is Crucial

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The time has never been more right for capturing the stories of people born in the last 100 years, and for getting that material firsthand from the very folks who lived those decades, recording their experiences while they're still able to provide rich memories and insights. Could there be any better project to promote lifelong learning, or any greater, more loving endowment to be left for those who will inherit tomorrow's earth?

We are in the midst of a worldwide information explosion, with every trivial tidbit of our lives being programmed onto computer chips. How many gigabytes of file folders and account numbers have been stowed away in your name? And yet, what of your credit histories or job references will matter, providing meaningful discernment for the enrichment of posterity?

In 100 years, will anyone care what kind of magazines we read, our average bank balances, or even our worldly goods bequeathed? No. What will matter is people, what they experienced, achieved, learned, thought and felt—what they bestowed for future generations to ponder.

Our primitive ancestors painted stick figures on cave walls in an attempt to leave records of themselves, accomplishing then with great difficulty what we can do handily via today's Worldwide Web.

When we think "SOS: Save Our Stories," we discover a warm and human application—perhaps the best possible *raison d'être*—for the technological marvels of our age.

Aren't we profoundly moved by sentiments expressed in faded letters from the Civil War era? By the tender diary entries of a gentle child named Anne Frank? By news accounts about ordinary folks who were thrust, just for an instant, into the spotlight of international high drama when two airliners slammed into the World Trade Center?

Yet the equally powerful unsung tales of our neighbors, friends and families are being lost at a disturbing pace, because we have not yet attached enough signifi-

The time has never been more right for capturing the stories of people born in the last 100 years, and for getting that material firsthand from the very folks who lived those decades, recording their experiences while they're still able to provide rich memories and insights.

SOS: Seasoned Journalists  
Issue Urgent Call to 'Save  
Our Stories'

cance to saving stories of common people routinely bypassed in the media frenzy for the cruelest, hottest, or weirdest happenings to explode in sound bites every 15 minutes.

With a drive to Save Our Stories, we find ourselves lauding the efforts of today's established autobiographical writers and biographers, and oral historians, following their example in an even broader way, with an idea whose time is now, and ever after.

But we realize that even with the passion and resolve of a host of determined wordsmiths, we cannot undertake such a massive dream alone. We're ready to take the next steps on a journey which can revolutionize how humans learn from each other, but we know we need assistance.

We wish to dedicate ourselves to this project to promote global peace and harmony, and with technical expertise and a nest egg to get our SOS sparked in many imaginations, countries, and cultures, we believe our generation can truly change the way earth's inhabitants relate to one another.

As I was completing this article, I fondly recalled the Sunday sermon which most impressed me over the years. It was preached by a Green Mountain Methodist minister, Dick Marceau, who is also a religious scholar. He explained to his congregation that a more accurate translation of "Love your neighbor as you love yourself" is actually: "Love your neighbor, because he is just like you."

How that resonates! When we come to know individuals at deeper levels, they become real to us. We are moved by their pain, ennobled by their sacrifices. Perhaps it would be less possible to war against them.

An international cyberspace databank of human experiences might be the greatest resource the world has ever known for promotion of global peace and understanding. And it would expand and endure, to speak when we no longer have voices, to teach, centuries after we've been forgotten, and to reach beyond the borders of time and space to that quiet inner realm where persons of all faiths are genderless and ageless, and free of limits and foibles, becoming instead valued fellow sojourners on a single sacred adventure.

We are now brainstorming syndication possibilities, exploring plans for a databank, a Web site, and doing public speaking to spread the word on our Save Our Stories concept. Who knows where we'll proceed from there?

It may seem hard to comprehend that if we can Save Our Stories, we might foster a new era in global communication; but we believe that is true.

**Mary Ellen Corbett**, a reporter for more than four decades, holds dozens of honors for journalism excellence, including the first Best Feature Writing Award from the prestigious American Society of Newspaper Editors. Her work was showcased in a 1978 Poynter Institute textbook, *Best Newspaper Writing*. She has had bylines in more than 100 American dailies, including *The Washington Post*, *Chicago Tribune*, and *Boston Globe*. Corbett now conducts autobiographical writing classes in Silver City, New Mexico.

## Time Banking and Co-Production: Timely Tools for Older Adult Learners

By Kym Dakin

### Abstract

*Time Banking is explored as a tool to increase efficacy and well-being among elders. As a dynamic community resource, a Time Bank functions as a means for elders to maintain independence, contribute their skills to benefit community, access lifelong learning, and receive assistance with dignity, without the exchange of cash dollars. Examples are provided of several Time Banks in New England that benefit older persons through a variety of programs. As our economy is influenced by globalization and the rising tide of retirees, Time Banking holds promise for being an important tool for older persons to maintain community connections and quality of life.*

“Within each crisis, there lies opportunity.” These are words from the Zen tradition we might apply to many challenges in our culture now, one of which is our society’s current looming crises in the quality of life for elders. The impressive economic gains in our market economy have come at great cost to what Time Banking founder Edgar Cahn terms the “Core Economy”—the vital network of neighborhoods, family, and caring community so important to quality of life, the growth and development of our children, and the mental and physical health and development of older citizens—a demographic reality whose numbers and issues will soon explode as the Baby Boomers age and retire. (Cahn, 2004) Yet, the gift in this crisis is the now urgent incentive for creative solutions to keep older people independent, learning, and contributing to our culture, regardless of their income level. One of these solutions is Time Banking.

Time Banks have been quietly taking root in this country over the last 20 years as a creative response to what Robert Putnam coins as the American tendency towards “Bowling Alone.” In a recent article featured in *Journal of Democracy*, Putnam outlines a world familiar perhaps *only* to our elders, a world now mostly lost in our high-speed, technological age—where neighbors knew each other, helped each other, engaged with each other. (Putnam, 1995). Children were looked after by neighbors and elders were respected. People felt known, safe, cared for.

After targeting possible reasons for America’s declining social capital—more women in the labor force, more of us uprooting ourselves from where we were raised and “transplanting” elsewhere, the divorce rate, lower real wages, and our



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tendency to reach for the remote control instead of each other to entertain ourselves—Putnam declares the need to find organizations and networks that nurture and re-ignite social capital, in the sense of what he terms “mutual reciprocity,” the currency of *America’s Core Economy* (Putnam, 1995). The mission of Time Banks clearly fills this need.

In the 1960s, a driven, highly successful Washington, D.C. lawyer and speechwriter for Robert Kennedy named Edgar Cahn found himself laid up in the hospital for a six-month recovery from heart failure. Although he felt immobile and useless for perhaps the first time in his life, his failing heart had given him what he could not previously allow for himself—the gift of time. He now had time; to watch other heart patients not so materially fortunate as he, time to feel his own sense of uselessness and frustration at having to be on the receiving end of daily care without opportunity to care for himself or give anything back to his caregivers, and perhaps most important, time to discern meaning from his experience. He realized that he had been given a small taste of the devaluation and frustration that welfare recipients, older adults on fixed incomes, and other marginalized people bear as the chronic receivers of charitable relief, and he began to invent an alternative: Time Banking.

The concept of Time Banking is simple. Skills and services performed by members earn one time dollar for each hour spent performing that service, *regardless of the service*. This is an important distinction in a market economy that is built on the scarcity model of supply and demand, an economy that pays \$100 an hour to take care of computers, and \$10 an hour to take care of children. These time dollars are then banked in a computerized system that tracks credits and debits in individual accounts. Members can use their time dollars in an extensive network to access hundreds of services, ranging from classes at a local college and home cooked delivered meals to transportation, concert tickets, massage, and home repair. Some may think they recognize this as a barter system. While there are similarities, Time Banking is different. Members rarely engage in direct exchange. Rather, they tap into a larger network and their exchanges are not subject to taxation, as they would be with barter arrangements. Secondly, the unit of exchange is time, not goods, as is often the case in a barter system.

Time Banking as a movement is built upon the core values of trust, equality, reciprocity (made active through co-production), and re-defining what is considered valued work. There can be no community cohesiveness without trust. A breakdown in community trust contributes greatly to isolation and lack of mental stimulation in older adults. Establishing trust requires the building of relationship over time, and an effective Time Bank can be a vital means of consistently creating those connections within a community. Equality is built from the assumption that all of us have value and deserve respect for who we are right now, not at some future date after our health improves or when we lose weight or earn more money.

The importance of reciprocity and co-production are also of importance in the education of elders who take part in Lifelong Learning Institutes and other adult education programs. A top-down, “teacher-as-authority” model of education often backfires with learners who have decades of life experience. Instructors who actively practice the principles of participatory, democratic education, by contrast, directly embrace the equality of instructor and student, respecting older participants for

the value they bring to the learning experience (Collins, 2006).

Similarly, the value of reciprocity distinguishes Time Banking from more familiar social service missions. Members are assumed to have qualities and skills of value to the network, and are strongly encouraged to give services as well as receive them. Reciprocity is the generating principle behind co-production, a Time Banking term that essentially expects and encourages the recipient of services to help create his/her own solution to problems that affect their well-being. For example, if an older person, let's call her Sarah, comes to a Time Bank with increasing vision impairment and wishes to tap into the network for someone to read aloud to her, it is in Sarah's best interest to identify something she herself can give back. Perhaps Sarah enjoys listening to music and can be a companion to Lillian, another older woman who loves attending concerts, but doesn't like to go alone. Each of these women will earn a time dollar for the hours they engage in service. The earning of this currency is one factor that differentiates Time Banking from traditional volunteering. On the surface, the earned time dollar is little more than an abstraction—there is no paper representation of this currency within the network. Nonetheless the fact that time dollars are “counted,” recorded, and made visible in a statement makes the value of the services that earned them tangible within a recognized system, and therefore of value in the minds of many older people. The notion of creating actual (material) time dollars has been considered by some programs and may one day be implemented, but there is concern that the same thing would happen with time dollars that happens with cash dollars, i.e., the more of them one has the “richer” one is and the less one's individual skills and assets are emphasized and celebrated.

Sarah and Lillian are reciprocating services through what Cahn has termed “co-production,” a critical model for gaining the active participation of older people. (Cahn, 2004) Many elders are reluctant to ask for help because it risks reinforcing helplessness in themselves and in the eyes of others. Creating opportunities to give back and “co-produce” in ways individuals enjoy and that tap into skills and interests is fundamental to keeping elders socially active and mentally engaged. This is a primary reason for the success of Time Banking with older people.

Finally, the definition of valued work in the time dollar model requires that we reconsider what we regard as valuable use of time to include activities that support neighborhood, family, community, and self-development. This principle, though contrary to our cultural assumptions of retirement as time to play, is a fundamental aspect of aging for many people in their later decades. Work and work-life balance, along with expanded opportunities to learn and change self-definition, become increasingly important for older adults, regardless of their socioeconomic status (Sadler, 2006).

### Efficacy and its Impact on Senior Well-being

On any given day at the Portland Time Bank, a few older persons drop by to say hello to Charlene or Robin, coordinators here, to help out with administrative tasks, and often to socialize awhile with faces they have come to recognize over the years of their membership. Today is special because Elizabeth is back after a long recovery from heart trauma, and the daily office routine has pretty much stopped in order to re-connect with her. Elizabeth has been an important part of the run-

Finally, the definition of valued work in the time dollar model requires that we reconsider what we regard as valuable use of time to include activities that support neighborhood, family, community, and self-development.

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ning of this Time Bank. She coordinates many outreach mailings and does time-consuming, repetitive tasks well, particularly those that require more attention to detail than simple envelope stuffing. Most nonprofit organizations value and are under pressure to retain volunteers of Elizabeth's caliber, but Elizabeth is not a volunteer—she earns a time dollar for each hour she works, and “buys” a variety of services with them. Over the years, she has tapped into the Time Bank for help with assistance in moving, light housekeeping, and her recent hospital recovery. “Working with the Time Bank has done me a lot of good,” she says. “As you get older, it's nice to be appreciated and needed. My opinions are sought and valued here, and I don't often experience that in other parts of my life.” Through her work with this Time Bank Elizabeth has accrued many time dollars, which she plans to use to send her son on a schooner trip. “He's been so good to me. It will be nice to give something back.”

The Portland Time Bank counts over a quarter of its population as older adults, and they are among its most committed members. No matter their level of physical fitness, these elders can serve their Time Bank through a variety of skills and tasks: phone calling about specific events, cooking and catering, putting up posters for arts events they enjoy. Many members also serve as ambassadors—spokespersons and liaisons to organizations with which they are associated. Often they are found in positions of responsibility which they have held over a period of time, and are often among the first to be called for last minute emergency needs—from a car ride for an elder who needs to get to the doctor, to pet sitting for a family called out of town, to home-delivered meals for a member recovering from an operation. The range and scope of their contribution is enormous because elders often have something that is in short supply for the rest of us—time. Elizabeth is not wealthy. She does not fit the profile of a Junior Leaguer or even a church volunteer. She needs to get something tangible in exchange for her time, and she is not alone. With healthcare and cost of living increases, combined with expanding numbers of elders in the coming decades, organizations like Time Banks could become key resources for older people to stay engaged and to continue learning. Studies conducted decades ago (Kearney, Plax & Lentz, 1985) indicated that the high levels of life satisfaction and continued learning associated with volunteering and other types of elder activities greatly benefited wealthier participants, but were not particularly relevant to those seniors on the economic fringes, and that alternative types of programs were necessary, particularly for lower socioeconomic groups (Kearney et al., 1985).

However, members like Elizabeth did not join the Time Bank only because of services they can get for their time dollars. They are there because associating with the Time Bank makes them feel like they are contributing something of value and worth. Multiple studies done through the Center for the Advancement of Health and the MacArthur Foundation have demonstrated the relationship between increased levels of efficacy and diminished risk for physical disease, mental illness, and death. Efficacy, the power to create change, is largely understood by our culture to diminish with age. Americans often consider elders as an annoyance and a burden whose decreasing physical stamina and health, our culture assumes, must mirror similar deficiencies in mental capacity and efficacy as well, but these assumptions are steadily being dismantled.

A briefing distributed by the Center for the Advancement of Health titled “Getting Old: A Lot of it is in Your Head” features an interview with John W. Rowe, president of Mt. Sinai School of Medicine and chair of the MacArthur Foundation Research Network on Successful Aging (Rowe, 1998). The purpose of the creation of this network was to counter preoccupation with age as a process of loss and disability with studies of factors that allow older people to function well, despite the physical changes associated with aging. One of the studies noted in the brief involved 72 nursing home patients with a mean age of 78 who were asked to put together jigsaw puzzles. A third of the patients were given no help, a third were given a little help, but mostly in the form of encouragement, and the last third received extensive help. Performance by the last group was worse even than that of the group that received no help, and both groups were out-performed by the group who were given some help, but not much (Rowe, 1998). This group is an example of the power of efficacy, a sense of mastery through successful learning that Rowe and his team have found to be a statistically significant predictor in keeping cognitive function as one ages. Other statistically significant factors discussed were social support, especially emotional support, as distinguished from another important element: instrumental support. Rowe concludes that these factors form a distinct mind-body connection in successfully aging elders, and our cultural tendency to coddle and infantilize older adults is highly detrimental to their sense of self-worth and accomplishment. It’s far better to foster efficacy and social engagement by creating situations that not only encourage elders to learn and grow, but that honor who they are and the life experiences they offer.

William Thomas is a geriatrician dedicated to restoring America’s elders to their rightful position as respected, valued, and productive community members. His book, published in 2004 and entitled *What Are Old People For? How Elders Will Save The World*, traces our species’ competitive advantage to the fact that females can and often do live 40 to 50 years beyond their fertility, making them vital and important agents in family survival. These grandmothers largely retain their nurturing skills and instincts and can take care of older siblings often ignored by parents distracted with their more vulnerable younger offspring. This factor, according to Thomas, was key in the physical success of our species, but he does not stop there. In an article excerpting his book in *YES! Magazine*, Fall 2005 issue, Thomas declares that “Homo sapiens generalized the benefits of grandparenthood by linking old age to the work of social evolution. The development of human culture—its refinement, storage, and transmission—was woven into the fabric of old age” (Thomas, 2004). Thomas considers older persons to be guides and “masters of the school of life,” whose primary responsibility in modern times is to initiate younger generations in the transition between childhood and adulthood. They are our “libraries,” the receptacles of all that is of value in our cultural experience, which they are eager to share in stories, in healing, in spiritual wisdom. The aches and pains and physical limitations so terrifying to our “eternal youth” culture are, according to Thomas, the necessary ingredients in a different kind of learning, by slowing down and taking stock; by forcing the attention and focus inward, towards peace and wisdom, away from the ego’s preoccupation with position and rank (Thomas, 2004). This, of course, is not a process valued by a culture that encourages a consumer-driven maelstrom run by stressed-out adults with to-do lists sta-

...Organizations like Time Banks could become key resources for older people to stay engaged and to continue learning.

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pled to their foreheads. Without the balance and leavening that elders provide, Thomas asserts that we become solely preoccupied with “doing, having and getting that diminishes the value of stewardship in our culture” (Thomas, 2004). Stewardship, defined by Merriam-Webster, is the careful and responsible management of something entrusted to one’s care, like family, neighborhood, and community, like the Time Bank’s concept of the Core Economy. According to Thomas, we have much work to do to repair our cultural relationship with our elders, and we need to begin that work, “not because it can right wrongs that are visited on older people (although it can) but because it is the essential precondition for a new culture committed to a better quality of life for people of all ages” (Thomas, 2004). In light of the fact that within a century, the population of Americans over the age of 65 has more than tripled, Thomas concludes, “The most elder-rich period of human history is upon us. How we regard and make use of this windfall of elders will define the world in which we live” (Thomas, 2004).

### Lifelong Learning Potential through Time Banking

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A year ago, when I began working for the Portland Time Bank in earnest, I needed some help in creating a presentation with an unfamiliar computer system. I put the call out to the membership to see if anyone cared to earn time dollars to assist me, and the next day a small woman in her seventies walked into my office offering her computer expertise.

Therese was one of the first members to join the Time Bank in 1996, specifically to learn about computers. “Learning something like this at my age, maybe it’s uncommon, but I feel there is no point in stopping one’s learning.” From there, she learned how to fix her own bicycle, cut people’s hair, and even do oil changes on cars. “I began to realize a long time ago, that life offers opportunities to learn at every age.” Therese is a shining example of someone making the most of lifelong learning opportunities through Time Banking. Partner organizations like Portland Adult Education and Women Work and Community afford people of all ages classes on hundreds of subjects in exchange for time dollars. The network continues to seek out actively educational opportunities for older members who may not be able to access programs with steep tuition fees, members like Therese who continue to demonstrate vibrancy in learning and their value to their communities.

Jeffrey is another member of Time Banks intimately connected with lifelong learning. A Reiki Master—Reiki defined as a form of healing touch—he has a vision for a very specific learning program for elders called “EldersBloom,” which he has begun to offer through the Portland Time Bank. EldersBloom is a program Jeffrey devised several years ago as a means to get older persons engaged in their own healing, and teaching others how to do Reiki, described in his literature as currently “practiced by millions around the world and used in hospitals and medical settings” (Hotchkiss, 2006). Jeffrey originally began working with elders through Southern Maine Agency on Aging and by volunteering with a few long-term care providers. He initially targeted his efforts primarily towards providing relief for elders in pain, but realized that he was operating on the hidden assumption that “aging was an affliction.” Something in that assumption made him question his motivations, and after reading Thomas’s *What Are Old People For?* he realized that “We have it exactly wrong in our culture. Elders need to be our guides and our healers.

We need to switch our mindset to Elders as a resource and a blessing, not a burden.” The realization came to him that Reiki is relatively easy to learn and teach others, and that elders could gain much satisfaction from healing themselves and being healers for others. In addition, Reiki can be performed by people no matter their degree of mobility, so someone who is in a wheelchair or even bedridden can still provide this service for others.

Jeffrey knew he was on to something when he began working with a gentleman named “Joe,” an Alzheimer’s patient and resident in a long-term care facility. Initially, Joe had been almost frozen in a defended fetal position common to the advanced progression this disease. After a few treatments, his body became more relaxed and open, and he began to be able to communicate verbally with Jeffrey and his other health providers. After a time, Jeffrey began to experiment with whether his client could learn how to perform Reiki on himself between treatments, and Joe did not disappoint. He retained the training he had received in his Reiki sessions and was able to progress noticeably in his physical relaxation and communicative abilities. Jeffrey knew that if Joe could learn and improve his condition, then so could other older persons.

At this writing, EldersBloom is in its infancy. Jeffrey envisions his primary goal as the creation of Reiki programs administrated and taught by the residents of long-term care facilities, healing themselves and teaching others to do the same, thereby becoming resources for each other as well as their surrounding communities.

“Learning something like this at my age, maybe it’s uncommon, but I feel there is no point in stopping one’s learning.”

### Perceived Social Support and its Impact on Senior Health

Angelo, a retired grocer, and David, a retired machinist, got to know each other as participating members of Elderplan, a time dollar model of service exchange launched by Edgar Cahn in 1987 through a grant from the Robert Wood Johnson Foundation. Through this program, they began doing home repairs together in their Brooklyn neighborhood, but they have gained much more than time dollars. “We found out we live half a block from each other,” says Angelo. “All this time we never even met already—and now we’re close friends—it’s amazing!” (Jones, L., producer (2003) *Time Banks in Action* {Compilation Video}). David and Angelo, as members of Elderplan, are encouraged, regardless of their physical condition, to earn time dollars by providing assistance to other elders that would help keep them independent in their homes. At the time, it was not at all certain whether this model would work. A multi-phase study was done spanning a two-year time period from 2000 to 2002. The objectives were both to study the role of time dollars in Elderplan’s effectiveness and to analyze differences in factors indicating quality of life between Elderplan members who participated in the time dollar program and those who did not (Cahn and Gray, 2003). The results clearly indicated that social interaction is linked with improved emotional as well as physical well-being, and that the time dollar participants fared better than the control group. Combined data further indicated that the program attracted elders into service exchange who had not been drawn to traditional volunteer programs, over 30% indicated they had never before volunteered. Many of the participants, over 40%, claimed they did not know how they would manage to keep living independently had it not been for the member-to-member benefits of their Time Bank. The program was hailed as a means of “humanizing” healthcare, with positive effects on

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elder's self-perceptions through its social support and ability to make elders feel needed and valued.

Social support, as defined by Centers for Disease Control, "includes real or perceived resources provided by others that enable a person to feel cared for, valued, and part of a network of communication and mutual obligation" (CDC.gov/mmwr/preview Weekly, May 6, 2005/54(17); pg. 1). A telephone survey was conducted in 2000 through the Missouri Department of Health and Senior Services on a sample of 3,112 respondents. These respondents varied by sex, marital status, education, annual household income, self-rated health and limits around activity. Questions were asked about the number of persons living in the same house, how often they visited or were visited by people they knew over a 30-day period of time, and the number of people from whom they felt they could get emotional support. They were asked to calculate how many days in the prior month their physical health was impaired, or they felt stressed, depressed, and emotionally fragile, and how many days they felt full of energy, healthy, and engaged. In the spring 2005 final report, the findings suggested a strong association between perceived social support and enhanced quality of life. The report categorized social support as emotional (e.g., three or more friendships, consistent contact with friends), instrumental (e.g., errands, transportation) and informational (e.g., sharing resources). Interestingly, the study found that living alone did not necessarily increase levels of depression and loneliness, and that social support promotes health and well-being in older persons by providing them with "positive experiences, socially rewarding roles, or improved ability to cope with stressful events" (CDC Weekly, pg. 2).

Again, Time Banking provides elders with consistent opportunities to build friendships and networks, access vital instrumental services, and receive sources of information interesting to them. Several Time Banking programs in the northeast focus exclusively on older adults. Partners in Care, located in Fredrick, Maryland, is geared exclusively toward elders and provides a variety of specific services; Ride Partners transportation program connects elders who drive with those who need to do errands, go to the doctor etc.; Repairs with Care home repair services are provided by seniors adept at home repair; Just in Case provides emergency kits with three days of water, nutritious food, radios, and other essentials for emergencies such as power outages, built and distributed by older persons for isolated elders; and the Boutique, a resale store which not only provides sustainability to the organization, but also functions as a lively community center, offering the ever-important means for older adults to both socialize and access multiple opportunities to help their community. Partners in Care had a 27% increase in membership in 2004 and expects even higher levels this year. Last year, in a report titled "Seniors Benefit from Transportation Partnerships," the U.S. Administration on Aging listed Partners in Care as one of the country's 14 "most promising practices," another testament to Time Banking in action (U.S. Administration on Aging, 2005).

Edgar, a lifelong learner in his seventies, is clearly invested in making Time Banking ever more important to older adult learners, who have much to gain through membership with a Time Bank. The models currently at work and in development in Time Banking directly align with the requirements and interests of older adults to encourage the benefits of social engagement, efficacy and learning

opportunities, regardless of income level. Through the specific programs outlined here, and many others launched around the world, the Time Banking movement actively engages older learners to become the best that they can be for themselves, their families, and their communities.

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Time Banking provides elders with consistent opportunities to build friendships and networks, access vital instrumental services, and receive sources of information interesting to them.

**Kym Dakin** serves as outreach coordinator for the Portland Time Bank, an organization with which she has been associated for over 10 years as a member, advisor, and consultant. She develops and implements training programs in Time Banking on a variety of topics for the New England area. In 2006 Kym received her master's in adult education at the University of Southern Maine. She has worked with USM's Center for the Study of Lives and the Maine Creative Economy Institute. Kym also runs Short Fuse Interactive Inc., developing experiential trainings on a variety of topics in business and education.



## Two Poems from *Suite for Lifelong Learning*

**Samuel B. K. Chang**

### **Lifelong Learning: Tai Chi**

Dieter Runge, honored Sifu,  
Class assembled we address you.  
As we begin Chi Kung warm up  
Clenched fist will meet open palm cupped.  
Left foot forward, up right foot springs  
Knees slightly bent, both arms now swing.  
Forth and back, the cycle we go  
Energy through our bodies flow.  
Open, Turn, Begin. Lesson starts  
As teacher to pupil imparts  
The sequence of proper Tai Chi  
Moves from beginning until we  
Close with both hands turned in and then  
Both arms to sides as training ends.  
Clenched fist meets open palm as before  
Palms down, one circles the other o'er.  
Right foot steps back, left foot to match  
Heads bent, hands clap, now ends the class.

## Lifelong Learning: Ethnobotany

From Isabella Abbott we  
 Learned about Hawaiian history,  
 Regaling us with tales when she  
 Traversed trails that passed past land and sea.

A youngster she accompanied  
 An uncle to where the birds did feed.  
 With gummy substance on the trees  
 Birds' feet did stick so that uncle he  
 Could pluck such feathers he could use  
 With other ones in amounts profuse  
 To fashion artistically  
 A cloak of feathers for all to see.

In other classes we did learn  
 Of ko, kalo and azolla fern  
 Of uhi, ulu, mai a, niu  
 Of gods, Kaneloa, Lono, Ku,  
 And of Kane most powerful.  
 Thus did we pass each class hour full  
 Of rapt attention as she spun  
 Stories of ancient myth and legend.

Deserved fame limu studies have brought her.  
 Proud are we, illustrious native daughter.

**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 Influence of Lifelong Learning on Mood

**Patricia M. Simone and Amie Haas**

### Abstract

*Mood state was assessed both before and after four different two-hour classes in the Osher Lifelong Learning Institute at Santa Clara University with the self-report Profile of Mood States-Brief Form (POMS-BF) developed by McNair, Lorr, and Droppleman (1992). Sixty-eight students (60% women), ages 49 to 92, filled in the 5-point mood assessment survey rating how they felt at that moment prior to the start of class and again two hours later, at the end of class. At the start of class these students reported very low levels of negative affect (tension, anger, depression, confusion, fatigue). Following the two-hour Osher class students felt even less angry, less tense, and less depressed than they were before the class. These results are discussed in relation to mood regulation and the detrimental impact of negative affect on cognition (e.g., Wilson, Mendes de Leon, Bennett, Bienias, Evans, 2004).*

**A**re students happier after attending an Osher Lifelong Learning Institute class? Do Osher classes improve mood? As a director of an Osher Institute, I would like to be able to tell members and potential members that in addition to the many reasons to become a member (such as improved cognition), taking classes can also make you happier. Anecdotally I knew this was true, but I did not yet have the evidence.

### Mood and Cognition

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The association of depressive symptoms with cognitive impairment in the elderly is becoming well-established in the literature (e.g., Wilson, Mendes de Leon, Bennett, Bienias, & Evans, 2004; Paterniti, Verdier-Taillefer, Dufouil, Alperovitch, 2002; Geerlings, Schoevers, Beekman, Jonker, Deeg, Schmand, Ader, Bouter, van Tilburg, 2000). Although it is difficult to determine the exact relationship between mood state and cognition (Stewart, 2004), there is mounting evidence which implicates symptoms of depression as a risk factor for cognitive decline. This is an important association because depressive symptoms and concerns about cognitive ability are common in the elderly (e.g., Jorm, Christensen, Henderson, Korten,

MacKinnon, & Scott, 1994). Therefore, finding ways to alleviate depressive symptoms in older adults may be beneficial in maintaining cognitive status.

How common is depression in the elderly? There is some debate over the relationship between age and mood disorders, with depression most often evaluated. Some studies report that depression rates decrease with age (e.g., Flint, 1994) and others report that depression rates increase with age (e.g., Wernicke, Linden, Gilberg, & Helmchen, 2000). Through a literature review, Djernes (2006) found that depression is frequent in the elderly with prevalence rates of major depression ranging from 0.9%–9.4% in community-dwelling aged adults.

In another recent study, Teachman (2006) examined the relationship between age and symptoms of anxiety and depression. Teachman defined depression as a collection of symptoms lying along a continuum rather than as a discrete clinical category of major depression, in part because depressive symptoms that do not reach threshold for diagnosis in older adults can still be disruptive to daily functioning (e.g., Schaub & Linden, 2000) and may lead to clinical depression over time (e.g., Paterniti et al., 2002). Using self-report data from community-dwelling adults, Teachman (2006) found that symptoms of negative affect (depression and anxiety) began to increase in older adulthood (mid-70s).

## Improving Mood

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People often participate in a variety of activities to improve their mood. Thayer, Newman, and McClain (1994) asked adults of many ages (18-89) to identify strategies used to modify their mood and found an overlap between methods people used to change a bad mood, reduce tension, and increase energy, with exercise being most effective. Engaging in distracting activities, such as doing chores, spending time on a hobby or fun activity, shopping, reading, and writing, were also identified as highly successful in changing a bad mood.

Thayer et al. (1994) identified gender and age differences in strategies used to improve mood. Men tended to seek pleasurable activities and distraction while women used more passive strategies such as social support. In addition, older adults tended to rely more on tending to chores and engaging in religious practice to improve mood than younger adults.

The question this research aims to address is whether taking a university-affiliated Osher class can improve mood in men and women over the age of 50. The instrument used in this study to assess mood states, the Profile of Mood States (POMS) is a widely accepted measure of psychological distress in several populations, including aged adults. The brief version of the POMS used in this study (POMS-BF) asks 30 questions, with five questions measuring each of the following six subcategories of mood: tension, depression, anger, fatigue, confusion, and vigor.

## Method

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Participants ( $N = 68$ , 60% females) consisted of adults between 49 and 92 years of age ( $M = 68.4$ ,  $SD = 8.0$ ) enrolled in one of four Osher classes offered at Santa Clara University in the fall 2006 or winter 2007. Twenty-eight participants were enrolled in “Historical Jesus,” five in “Genetically Modified Foods,” 17 in

Men tended to seek pleasurable activities and distraction while women used more passive strategies such as social support. In addition, older adults tended to rely more on tending to chores and engaging in religious practice to improve mood than younger adults.

## The Influence of Lifelong Learning on Mood

“California History,” and 18 in “Armchair Traveler: Destination France.” Pre- and post-surveys on mood were given on the second or third of five class sessions in each class.

### Materials

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Mood state was measured by self report both before and after a two-hour Osher class using the Profile of Mood States-Brief Form (POMS-BF; McNair, Lorr, and Droppleman, 1992). The POMS-BF is a brief, standardized, and commonly used measure of psychological distress in clinical and non-clinical populations. The self-report survey contains 30 adjectives with five separate questions assessing six aspects of mood: tension, depression, anger, vigor, fatigue, and confusion. These adjectives were rated on a 5-point scale with low scores (0, 1) indicating that the person was experiencing that feeling not at all or very little, and higher scores (3, 4) indicating that the person was experiencing those feelings quite a bit or extremely at that time. Scoring on each dimension involved adding up the scores of each of the five adjectives in that related mood dimension. Mood dimension scores could range between 0 and 20, with high numbers reflecting more of that mood and low numbers indicating less of that mood.

### Procedure

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A researcher explained the study prior to the start of four separate Osher classes at Santa Clara University (Historical Jesus, Genetically Modified Foods, California History, Armchair Traveler). All students were informed that the nature of the study was to assess variations in mood over the course of two hours. There were no risks to participation and no one was compensated in any way for participating. Those interested in participating were asked to sign a consent form approved by the IRB at Santa Clara University. They were then given the POMS-BF and asked to indicate on a five-point scale how each of the words described how they felt right now. Low responses (zero and 1) indicated little or no feeling, and higher responses (3 and 4) indicated more intense feelings (quite a bit or extremely). A score of 2 reflected having that feeling moderately. Upon completion of the class two hours later, they were asked to fill out another POMS-BF, again indicating on this five-point scale how they felt at that moment.

### Results

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Scores on each dimension of mood (tension, depression, anger, vigor, fatigue, and confusion) were calculated by adding the number given to each of the five questions in that dimension, with high scores indicating more of that emotion and low scores indicating less of that emotion. The highest score of 20 would indicate a great deal of that emotion. The lowest score of zero would indicate having that feeling not at all. See Table 1 for a list of all the scores for men and women both before and after class.

The composite score for each of the six emotion dimensions was subjected to a one-way repeated measures ANOVA comparing pre- and post-class survey scores. The between subjects factor was gender.

Table 1: Mean Post-Pre POMS Scores (SDs)

Mood	Total		Men		Women	
	Before Class	After Class	Before Class	After Class	Before Class	After Class
Tension	1.7 (3.0)	0.8 (1.8)*	2.2 (3.9)	0.9 (1.5)	1.4 (3.0)	0.8 (2.0)
Anger	0.9 (1.6)	0.5 (1.3)*	1.4 (1.9)*	0.9 (1.8)*	0.6 (1.2)	0.3 (3.1)
Depression	1.0 (2.0)	0.8 (1.5)**	1.6 (2.7)	1.0 (2.1)	0.6 (1.4)	0.6 (1.0)
Confusion	3.5 (2.5)	3.2 (2.4)	4.3 (3.0)**	4.2 (4.9)**	3.1 (1.9)	2.6 (1.8)
Fatigue	2.4 (3.0)	2.4 (2.9)	3.0 (3.6)	2.6 (2.7)	2.0 (2.5)	2.3 (3.1)
Vigor	10.1 (4.7)	8.4 (4.7)*	10.0 (5.3)	9.2 (4.9)	10.2 (4.4)	7.8 (4.6)**

\*  $p < .05$ \*\*  $p = .08$ 

**Tension:** Participants reported very low feelings of tension before class, with a composite score of 1.7 for the five adjectives (tense, shaky, uneasy, nervous, and anxious). Nonetheless, while their feelings of tension were low to begin with, feelings of tension were reduced following their class (0.8). This decrease in tension was significant,  $F(1, 66) = 6.6$ ,  $MSE = 4.48$ ,  $p < .05$  and was experienced by both men and women,  $F(1, 66) = .86$ . An examination of Table 1 shows that there was no difference in tension reported by men and women,  $F(1, 66) = .74$ .

**Anger:** In general men reported significantly more feelings of anger than did women,  $F(1, 66) = 5.52$ ,  $MSE = 2.9$ ,  $p > .05$ . Before the class, scores on anger-related questions (angry, grouchy, annoyed, furious, bad-tempered) were higher for the men (1.4) than for the women (0.6). Both groups reported reduced feelings of anger at the end of class,  $F(1, 66) = 4.46$ ,  $MSE = 1.16$ ,  $p < .05$ , with men dropping to 0.9 and women to 0.3 and this did not interact with gender,  $F(1, 66) = 0.19$ .

**Depression:** Once again men reported more feelings of depression than did women both before (1.6 for men compared to 0.6 for women) and after class (1.0 compared to 0.6). This difference between men and women approached significance,  $F(1, 66) = 3.1$ ,  $MSE = 5.4$ ,  $p = .08$ . Additionally, the comparison of feelings of depression (sad, unworthy, discouraged, lonely, gloomy) before and after class approached significance,  $F(1,66) = 3.13$ ,  $MSE = 0.9$ ,  $p = .08$  and because depressive symptoms in both men and women declined across tests, the interaction between gender and depression was not significant,  $F(1,66) = 2.6$ .

**Confusion:** Men reported more feelings of confusion (confused, muddled, bewildered, inefficient, forgetful) than did women both before (4.3 compared to 3.1) and after class (4.2 compared to 2.6). This gender difference was significant,  $F(1,66) = 6.9$ ,  $MSE = 8.9$ ,  $p < .05$ . Feelings of confusion did not change from before to after class,  $F(1, 66) = 1.28$  and there was no interaction with gender,  $F(1,66) = 0.51$ .

**Fatigue:** There was no significant difference in level of fatigue (worn out, fatigued, exhausted, sluggish, weary) in men and women,  $F(1,66) = 1.04$ . Reported feelings of fatigue before class for men (3.0) and women (2.0) did not change significantly after class for either men (2.6) or women (2.3). Therefore there were no significant effects of the class on fatigue,  $F(1, 66) = 0.09$ , and there was no interaction with gender,  $F(1,66) = 1.11$ .

## The Influence of Lifelong Learning on Mood

**Vigor:** Men and women reported similar levels of vigor (lively, active, energetic, full of pep, vigorous),  $F(1,66) = 0.29$ . Both men and women reported feeling less vigorous after class,  $F(1,66) = 14.00$ ,  $MSE = 6.1$ ,  $p < .05$ , with average scores of for men going from 10.0 to 9.2 and 10.2 to 7.8 for women. Women experienced a more prominent reduction in vigor following class, an effect that approached significance,  $F(1,66) = 3.15$ ,  $MSE = 6.1$ ,  $p = .08$ .

## Discussion

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In general, Osher students attending these classes were not experiencing a great amount of the negative feelings of tension, depression, anger, fatigue, and confusion at the start of class. The highest score possible is 20 on each of these dimensions and Osher students reported very low feelings of tension (1.7), depression (1.0), anger (0.9), fatigue (2.4), and confusion (3.5) before the start of class. It is notable, therefore, that at the end of class two hours later students reported elevated mood. They were less tense (0.8), less angry (0.5), and less depressed (0.8) than when they started class.

Also interesting were the mood differences in men and women. Men were more angry, more depressed, and more confused than women in these classes. Even though both groups were less angry at the end of class, the level of anger in the men at the end of class (0.9) was still greater than that of the women even at the start of class (0.6). The same is true for depression. Men reported more depressive feelings at class end (1.0) than did women at the start of class (0.6). It is noteworthy that the women in this sample reported virtually no depressive feelings (0.6 on a scale from 0 to 20). It is perhaps because of this floor effect that the finding of reduced depression only approached significance.

In addition to being more angry and depressed than the women in the class, these men also reported more feelings of confusion, a feeling that was not affected by the class in either men or women. While Osher students did not feel less confused at the end of class, it is important to note that they also did not feel more confused following the class. Therefore, while the material was likely new and perhaps challenging for the students, this challenge did not cause them to feel unsure of themselves.

Benefits of sitting in a two-hour Osher class include feeling less angry, less tense and, at least for men, less depressed. However, a negative consequence to sitting in an Osher class is that one also feels less energetic as the level of vigor dropped from 10.1 to 8.4 at the end of class, an effect that was even more pronounced in the women (10.2–7.8). Since they took the pretest upon arrival to the classroom after having walked some distance and they filled in the post test after sitting in a chair for the two-hour class, it is suspected that this decrease in vigor was due to lack of mobility for the duration of class.

## Conclusion

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This research has found yet another reason to take Osher classes: they can improve your mood, and improved mood may make it more likely to continue taking classes and may even have a positive effect on cognition. While Osher members were not experiencing high levels of any symptoms of negative affect, the negative

emotions of tension, anger, and depression were significantly reduced following the classes. Men, who were more angry and depressed than the women in this sample, experienced an even greater benefit of mood elevation from attending the classes. Additionally, students were not more confused at class end, even though it is likely that the material they learned in class was novel and challenging. While level of vigor was reduced in all students, this effect likely resulted from sitting for two hours. Further experiments can determine how quickly vigor returns to pre-class levels and how long lasting the effects of mood elevation following a lifelong learning class are.

The fountain of youth eluded Ponce De Leon. Even so, thanks to many environmental and behavioral changes in the last century, Americans born today can expect to live nearly 30 years longer than Americans born 100 years ago. Years have been added to our lives. The challenge remaining is keeping the life in our years. What does it take to age well? Rowe and Kahn (1998) suggested three keys to successful aging: (1) maintain high cognitive and physical functioning, (2) stay engaged with life, and (3) avoid disease. Taking classes can improve cognition (use it or lose it) and, we have now demonstrated, classes can also improve mood, two factors that may make it easier to stay engaged with life.

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Benefits of sitting in a two-hour Osher class include feeling less angry, less tense, and, at least for men, less depressed.



## The Influence of Lifelong Learning on Mood

Wilson, R.S., Mendes de Leon, C.F., Bennett, D. A., Bienias, J. L., & Evans, D. A. (2004). Depressive symptoms and cognitive decline in a community population of older adults. *Journal of Neurology, Neurosurgery, and Psychiatry*, 75, 126–129.

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**Amie Haas** is a lecturer in the Department of Psychology at Santa Clara University. She received her Ph.D. in clinical psychology at the University of South Florida in 2001 and completed postdoctoral training at the University of California, San Francisco. She has been involved in several projects with older adults, including neuropsychological evaluations for dementia and evaluating the role of substance use on ADL functioning in older adults.

## Two Poems

### **Marilyn Brown**

#### **Near Mammoth Mountain**

Upward step by step  
to where the lupine and the sky meet  
and discuss which wears the more  
vivid blue;  
I reel, intoxicated by their conversation.

#### **Haiku**

Winter sun—for those  
grieving a death come too soon,  
sympathy, no warmth.

A Cincinnati transplant to San Diego, **Marilyn Brown** retired from secondary history and English teaching after 38 years. Her many loves include her husband, whom she met in Yellowstone Park 45 years ago, her standard poodle, Admiral Nado, nature of all stripes, walking and hiking, reading, and learning, especially with stimulating minds and hearts willing to share.

## Community Research Team: An Experiment in Member-Driven Research and Reflection

**Vincent Waldron**  
**Ralph Shattuck**  
**Don Zimbrick**  
**Lou-ellen Finter**  
**Phyllis Edwards**

### Abstract

*The Community Research Team (CRT) is a faculty-led research seminar attended by lifelong learners and traditional university students. Students read and critique research texts, design a research project with community significance, and write a collective paper about the results. This report is simultaneously a preliminary product created by CRT students as well as a reflection on the CRT process. We discuss the instructional approach, student reactions, the research process, and preliminary research results.*

In fall 2006 the Osher Lifelong Learning Institute at Arizona State University (OLLI ASU) launched the Community Research Team (CRT), a faculty-led research seminar for lifelong learning students. The CRT provides an opportunity for seasoned learners to meet with faculty, peers, and traditional university students to discuss the research process, read and critique research, learn about university research support services, conduct a research project with community significance, and publish the results. Prospective students were encouraged to bring their own research questions and ideas to the group. In short, the CRT invited lifelong learners to participate in the research mission of the university.

This report is simultaneously a preliminary *product* created by CRT members and their instructor during their first semester (six class sessions over 7 weeks) as well as a *reflection* on the CRT process. The team ultimately focused its work on a research question important to lifelong learning programs across the nation: “Why do some elders choose not to participate in their local lifelong learning program?” This brief report has significance for two kinds of audiences: 1) those interested in the CRT format and its applicability within their own programs, and 2) those interested in the preliminary results of the CRT’s research project on barriers to participation in lifelong learning programs.

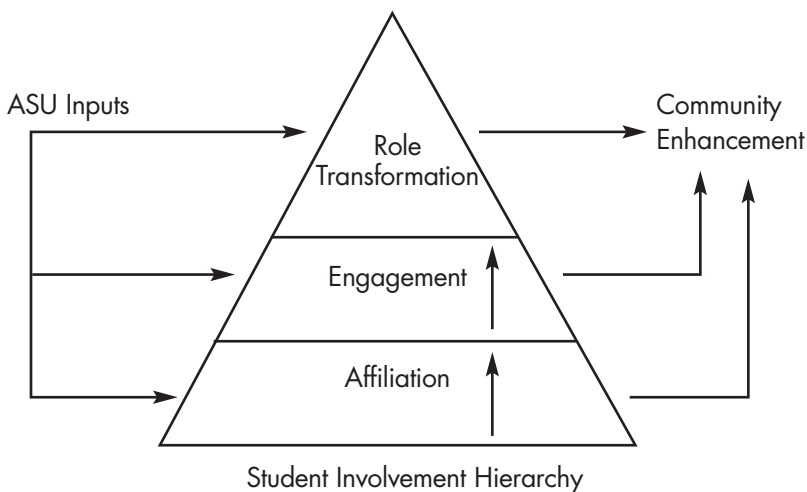
### Program Design: OLLI ASU

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The Osher Lifelong Learning Institute at Arizona State University is a confederation of community-based affiliates, with two of the largest sites located at the

Sun City communities in the northwest region of metropolitan Phoenix. Each site designs a curriculum and structure responsive to the needs of its local residents. ASU provides access to campus facilities, student privileges, administrative support, volunteer support, and some faculty instruction. As indicated in the “pyramid” model below (figure 1), some of ASU’s seasoned learners merely *affiliate* with the university and use its resources (e.g., libraries). However, most *engage* with peers and faculty to learn in small group discussions, lectures, and field trips. For still others participation is *transformative*, in that members experience significant changes in role identity. These members learn such new roles as researcher, teacher, curriculum developer, writer, community liaison, or board member. The CRT is one of these transformational activities as students adopt the roles of researcher and writer.

Figure 1: The OLLI ASU model



The CRT provides an opportunity for seasoned learners to meet with faculty, peers, and traditional university students to discuss the research process, read and critique research, learn about university research support services, conduct a research project with community significance, and publish the results.

### Community Research Team: Instructional Format

In its first semester the course met in six sessions. Students were six residents of the Sun City Grand community and an ASU faculty facilitator. The ASU instructor teaches courses in research methods and has been active in the design and administration of ASU’s Osher Lifelong Learning Institute program. Simultaneous with the community based CRT, an on-campus version was offered for ASU graduate and undergraduate students. Although not the primary focus of this report, the on-campus CRT provided regular meeting times for students to discuss their individual projects, which included faculty-directed reading and research, capstone projects, and honors theses. The on-campus CRT provided a forum for peer and faculty feedback, discussion of common readings, guest speakers, and interaction with lifelong learners.

The two independent CRT courses were joined for the final session, which included research presentations and peer feedback.

## Community Research Team: An Experiment in Member-Driven Research and Reflection

### Readings

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The course included accessible readings designed to stimulate discussion about the research process as well as research studies and lecture notes. For example, *Freakonomics* (Levitt & Dubner, 2005) was an assigned text. The book stimulated discussions about the validity of quantitative and qualitative data, the advantages and disadvantages of the economics metaphor in conceptualizing social problems, and wide-ranging discussion about Levitt's studies of cheating on standardized tests and crime statistics.

To promote reflection on the role of research in the local community, the class read several research articles on the history and social structure of the Sun City communities, including one published by local ASU faculty (Waldron, Gitelson, & Kelley, 2005). As the group mulled possible research questions, we read research articles on the learning preference of lifelong learners (e.g., Lamb & Brady, 2005), as well as newspaper articles on the social isolation experienced by younger and older citizens. To facilitate learning about various research methodologies, the students read lecture notes and handouts used in the instructor's on-line undergraduate research methods course. The notes addressed such topics as sampling procedure and survey construction. A sample survey (prepared by an undergraduate in the on-campus CRT) was discussed and critiqued. Finally a chapter about the methodological "tradeoffs" and personal experiences that shape social science research projects was read and discussed (Waldron & Kelley, in press).

### Class Activities

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In addition to reading and discussion, class members (1) collectively developed a research question, (2) reviewed possible data collection methods, (3) critiqued an existing survey, (4) conducted informal interviews with neighbors and associates as a "pilot" study, (5) considered possible sampling and survey distribution strategies, (6) developed survey questions, (7) collectively contributed to the writing of this research report (8) and made a preliminary presentation on the project to a group of graduates and undergraduate students.

### Instructional Format

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The course was similar to a graduate seminar in that members were expected to read research materials before class and to bring informed comments and questions to each class meeting. Each class lasted approximately two hours (with a brief break after approximately 60 minutes). Classes were loosely facilitated by the instructor, but discussion was free-ranging and partially driven by student interests and comments. Readings were distributed by e-mail. Seasoned learners were enrolled in an online course management system (as were traditional students) where they could access readings, participate in discussion groups, and locate links to Web resources. The CRT met at the SCG site for its first 5 sessions. The final joint session (with the traditional students) was held on campus.

## Preliminary Research Report—Rationale

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The media seems to be mindful that the numbers of “aged” population is expanding in the United States. According to the U.S. Administration on Aging, by the year 2020 about 60% of the aged population will be in the 65–74 year old age group. (Waldron et al., 2005, p. 283). In a recently aired PBS *Frontline* documentary titled, “Living Older” two provocative insights were presented: first, by the year 2040, nearly 30% of the US population will be 85 years of age or older; second, the U.S. medical system is successfully sustaining longevity of life and yet, at the same time, there is a disturbing awareness that quality of life may decline in the later years.

Planned communities like Sun City Grand attempt to provide the essentials, within or nearby the community, which a senior resident would need to sustain high quality of life (Waldron et al., 2005). These “essentials” can be broadly categorized as physical, social, psychological, and spiritual needs.

Recent research on long-lived elderly indicates that learning in old age is essential to vitality and, perhaps, longevity (Rowe & Kuhn, 1998). Sadler (2006) argued recently that people engaged in the lifelong learning process, instead of following the decrement mode of aging, have moved in new directions with personal growth and renewal. (p. 11). In a study of lifelong learning programs in Japan and the United States, it was reported that despite cultural differences, lifelong learning is viewed positively by both older learners and providers (Young & Rosenberg, 2006). A tome of research indicates that learning in old age has positive effects. Much of this was summarized some time ago by McClusky (1976), when he stated that elders are capable of improvement, learning, and change. He argued that communities should find ways to help older people rediscover, reinvigorate and reactivate their latent interests and talents they never thought they had (p. 119).

Given this research, our project is grounded in the proposition that lifelong learning programs can meet several of the needs of older persons (see Lamb and Brady, 2005). Yet, we observe that at any given time only about 3% of Sun City Grand residents are enrolled in our program (450 participants of a total of 16,500 residents = .027). Consequently, the answer to our research question should be of interest to local program planners, as well as those serving similar communities in other geographic locations.

Research question: Why do some residents of our community choose not to participate in the lifelong learning program?

## Research Plan

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At this point in our work, the CRT has developed a preliminary research plan and conducted a small-scale interview study to identify potential barriers to participation.

Qualitative results from the interview study will help us develop survey items, which will then be administered to a larger sample of residents. Results of this quantitative study will be reported at a later date.

Why do some residents of our community choose not to participate in the lifelong learning program?

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### Research Setting: Sun City Grand

In mid 1990s, Del Webb assembled 4,000 acres into a planned community for seniors, 55 years and older—the third major “city” built for retirees in Arizona following successful developments in Sun City (1950–60s) and Sun City West (1970–1995). The population of Sun City Grand (SCG) includes approximately 16,500 people living in 9,600 homes. The community includes golf courses, tennis courts, softball and baseball fields, various community meeting spaces, two exercise centers, and approximately 150 clubs and social groups. For roughly 50% of the population, SCG is a second home. A significant segment of the population lives elsewhere during the summer months.

After sports, the activity drawing the largest number of people is the Osher Lifelong Learning program.

In calendar year 2006, 1,367 students attended 111 classes. Classes typically meet once per week for one to two hours and last six to eight weeks.

The bulk of the instruction is provided by qualified volunteers, supplemented by ASU faculty members, librarians, and staff. The most popular classes over the last eight quarters (with more than 50 students) are Western Civilization, World Religions, Arizona History, and Jesus as a Jew. Spanish, art history, film, and Southwest culture are other popular offerings. ASU provides a free evening lecture series that draws as many as 175 attendees.

The Sun City Grand affiliate of OLLI ASU is administered by a half-time director, a quarter-time office manager, and numerous volunteers. Tuition is \$50 per semester, plus \$10 per class.

### Procedures

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**Sampling plan.** The CRT decided that a random sampling method would yield the most generalizable and useful data. The preferred method would take advantage of the geographical layout of SCG, which is organized around neighborhood blocks. Using a map maintained by the community association, we intend to sample random blocks and then households within blocks until we obtain a sample of roughly 200 non-participating residents. Neighborhood block captains will be recruited to help distribute and collect surveys. To increase response rate, participants will receive a gift certificate to the local coffee bar upon completing the survey. The purpose and local significance of the survey will be explained and ASU/community partnership will be emphasized to provide additional motivation. If, after consultation with block captains, this method meets with community opposition, an alternative would be to distribute the survey as an insert in the newsletter which is distributed monthly at the community centers (although some residents choose not to obtain it).

**Measures.** The CRT considered a variety of methods, including phone surveys, mailed surveys, on-line surveys, and focus groups. Phone surveys were rejected as unfeasible due to call screening and resident concerns about phone-based fraud. On-line surveys were rejected because a significant minority of residents lacks computers. Focus groups were rejected because due to lack of anonymity and concerns about generalizability of responses to the larger SCG population. The decision was to use a combination of mailed and hand-delivered surveys to targeted households, combined with incentives for participation.

The primary measure will be a printed 2-page survey, which can be completed in less than 10 minutes. The first section will collect demographic data including: gender, age, education level, ethnicity, residency status (full year/partial year), years of residency, employment status, years since retirement (if applicable), self-assessed physical health and mobility.

The second section will consist of a checklist of factors that may discourage participation in lifelong learning programs. Residents will check those factors that most apply. These items will be developed based on preliminary interviews with residents as well as lifelong learning instructors, staff, and volunteers. Results of these pilot test interviews are presented below. As the literature provides limited guidance on why elders choose not to participate, we inferred additional items from articles on the factors that seem to encourage participation in lifelong learning programs (e.g., Lamb & Brady, 2005).

### Pilot Study

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To determine potential reasons for nonparticipation, each CRT student interviewed nonparticipating neighbors and friends, asking the research question presented above. In addition, an undergraduate ASU student conducted key-informant interviews with on-site staff members and several experienced volunteers. Finally, the CRT instructor (Waldron) raised the question at a staff meeting attended by eight OLLI ASU employees and volunteers.

Answers to these preliminary inquiries were recorded and discussed at a CRT session. Through a constant comparative process of reading and re-reading the recorded responses and discussing (member checking) with fellow lifelong learners, students identified interpretative themes. Using this qualitative methodology, the CRT identified twelve potential “participation barriers.”

1. *Lack of Awareness.* Despite considerable publicity, some residents are unaware that the lifelong learning program exists or are ignorant of its purpose. These residents are likely to be (a) new to the community, (b) overwhelmed by the plethora of information about community activities, or (c) nonreaders of the community newsletter.
2. *Limited interest.* Some residents profess limited interest in the kinds of challenging courses offered by the program, preferring golf, craft, or social activities instead.
3. *Physical limitations.* Some residents report physical disabilities which hinder transportation to the lifelong learning site (they have difficult driving) or interfere with participation (sitting for long periods is uncomfortable).
4. *Cost.* Some residents find tuition and fees to be too high
5. *Competing activities/busy schedule.* A busy schedule of activities precludes participation, particularly if classes require commitments over several weeks.
6. *Competing lifelong learning programs.* Some residents drive to a less expensive, “less academic” program in a neighboring community.
7. *Course selection.* Course topics are of limited interest to some potential students.
8. *Intimidation.* The program’s affiliation with a university is intimidating to some residents, particularly those who have not attended college.

To determine potential reasons for nonparticipation, each CRT student interviewed nonparticipating neighbors and friends...



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9. *Caretaking responsibilities.* The time burden of caretaking (for an ill spouse) is prohibitive.
10. *Instructional and learning preferences.* Some residents choose not to participate because they perceive the courses to be too challenging, whereas others find them to be unchallenging. Some want more structured instruction while others want more informal discussion groups. Some want more instructors from the university while others want more peer-based instruction.
11. *Physical plant and technology.* Some previous students chose not to return because of difficulty with hearing in the classrooms, uncomfortable chairs, or breakdowns in instructional technology.
12. *Travel.* Part-time residents miss registration periods because they are out of state. Others report heavy travel schedules which interfere with class commitments.

### Discussion and Conclusions

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We discussed the feasibility of the CRT as a curriculum option and then the implications of our preliminary research activities.

As an instructional experiment the CRT met with mixed results. Enrollment was low (seven students) compared to most of our courses. One of those failed to complete the course due to travel commitments and another dropped due to transportation limitations. The small class size put us at disadvantage when it came to commanding scarce meeting space at the SCG location. We ended up moving the class several times to accommodate larger groups. However, the course was intended to be a small-group exercise, so these numbers are not disappointing in themselves. The majority of the students proved willing and able to complete the readings. Only one consistently chose not to do so. The instructor found the quality of discussion to rival that of an advanced undergraduate seminar. Although not inherently a limitation, the varied interests and the great enthusiasm of the students led to wide ranging discussions. Some of the intended topics of discussion were not addressed. A more structured instructional approach might have been more efficient than the informal conversational style used by the faculty facilitator.

Seasoned learners and traditional aged students met together in only one final class session. (SCG is located some 15 miles away from campus, so we decided to have the groups meet separately most of the time). However, this final session spurred considerable cross-generational discussion about research topics and methods. In course evaluations, traditional-aged students found it to be helpful and engaging. This aspect of the course should be expanded, perhaps through greater use of online discussion groups. In general, the CRT was judged a success by the instructor. All but one seasoned learner indicated enthusiasm for continuing the project.

### Student Perceptions

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Students were asked to craft brief written statements about their experiences in the CRT. Their reflections will help program planners understand why lifelong learning students might participate in a research seminar and how they might react to the relatively unstructured learning format. Ralph is a retired business person

and relatively new resident of the SCG community. He was motivated to take the course by his experiences as a community activist. Ralph and his neighbors had been successful in resisting the proposed location of a new fire station. For him, the CRT provided tools for understanding community preferences and possibly mobilizing neighbors around common goals.

The reason I chose to become a student of the CRT was that I wanted to be part of a group that would better understand the demographics of Sun City Grand. My objective was to become more effective with steering the community toward greater selection of classes in our OLLI as well as addressing community concerns about recycling and volunteer services.

Don has spent his career teaching in international schools located in such varied countries as Russia and Saudi Arabia. Yet, he enrolled in CRT with some hesitation. "As a seasoned learner, my anticipation of the CRT was one of uncertainty. After all, it had been years since I had undertaken formal research of any academic significance." A frequent and thoughtful contributor to class discussion, Don joined the CRT out of a desire to change his "cognitive status quo."

Lou-ellen is a retired educator "interested in music, Southwest prehistory, and research." An unusually committed learner as well as a volunteer OLLI instructor, she participated in both the on-campus (with traditional students) and off-campus (with OLLI members) CRTs. She found the learning climates to be similar, "informal... open discussion and a sharing of diverse ideas and opinions," although the off-campus group was more focused on the research needs of "a specific geographic area." For Lou-ellen the CRT provided entrée to the university's library and its student community. She now serves as an informal teaching and research assistant for university faculty. As Lou-ellen's case makes clear, the CRT may be a particularly welcome source of enrichment for volunteer instructors and highly committed OLLI students.

Students offered several comments about CRT learning activities. Ralph was comfortable with the unstructured learning format, in part because other OLLI classes require challenging readings and independent student research. "Some classes are even structured so that the class instruction comes from the students making presentation to other students, as in a class called 'Country Analysis' (which is facilitated by a former diplomat). Don brought a humanistic research perspective to most class discussions. He appreciated the opportunity to read and discuss a text which took a quite different approach to questions of human behavior. As he noted, "A reading and discussion of *Freakonomics* (Levitt & Dubner, 2005) provided a jolt to the complacency of my *modus operandi* of viewing the world and how it actually works."

CRT students were given the opportunity to write a section of this essay and share it with the group. As Ralph explained, this activity was familiar to some OLLI students: "Sharing our writing with other students was quite easy and many suggestions from fellow students helped improve the quality of our finished product. Taking a creative writing class from [instructor], in which your poems and prose were work-shopped by fellow writers, made our review process in CRT a breeze."

The final session of the course brought together OLLI members and traditional students for presentation and discussion of research projects. The response to this

"Sharing our writing with other students was quite easy and many suggestions from fellow students helped improve the quality of our finished product. Taking a creative writing class from [instructor], in which your poems and prose were work-shopped by fellow writers, made our review process in CRT a breeze."

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intergenerational discussion was generally positive. Ralph had this to say:

Our finished product was also presented to the traditional, non-senior students at the campus. This mix of presentations from senior and traditional students was stimulating and interesting. My view of traditional students was enormously expanded. When I was in college most of the students were 18-22, unmarried, and didn't work. Many traditional students turned out to be adults with jobs and families in their mid 20s and 30s, far older and more "responsible" than I expected.

Dayna is a self-motivated undergraduate and an adult learner who enjoys interaction with other serious students. She has her sights set on graduate school. Dayna enjoyed the CRT, calling it "one of my most gratifying undergraduate experiences" because of the small class size and high quality interaction. Regarding the interaction with community members, she sounded ambivalent. "As a whole, I enjoy diversity, so I invite the stimulation of different age groups, Osher students, and their perspectives. Occasionally, it was uncomfortable when topics were overly academic because I appreciate the feelings of others. Consequently, sometimes I was torn between my individual goals and our collective experience." University students like Dayna bring considerable research background to the CRT. In her case, the experience was enhanced through frequent individual consultation with the instructor. To further challenge these students, the next permutation of CRT will offer them roles as instructional and research assistants.

### Research Outcomes

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Our preliminary research yielded a rich taxonomy of potential reasons for nonparticipation in our lifelong learning program. These factors may apply to programs in other regions as well. Of course, additional factors may emerge in these other contexts. For example, our members take most of their courses at off-site locations, so campus parking congestion is rarely a participation barrier. Cost may be an even more prominent concern in poorer communities. As yet, we don't know which of these participation barriers is most prominent in our population. Our survey and subsequent statistical analysis is intended to help us answer questions of "how many" and "how much." The survey will also help us better understand demographic subgroups (part-time residents, men) that appear to be underrepresented in our program. At the time of this writing, a graduate student has incorporated the CRT results in a draft survey developed as part of a research course. CRT members will review and modify the items. The survey data will be collected and interpreted by next semester's CRT.

However, even our preliminary work leads to some concrete suggestions for increasing enrollments. For example, traveling residents should be encouraged to use our Web site to retrieve class schedules and registration information. Car pools can be arranged for residents with mobility limitations. The sound system can be improved for those who choose not to attend due to hearing loss. Scholarships can be introduced to offset costs for those who can not afford the program.

Having said all of this, we are pleased that so many residents do participate at the Sun City Grand site, which is just one of the communities allied with OLLI

ASU. Once our research is completed, we hope to entice even more seasoned learners to the program.

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**Phyllis Edwards** is a student member of the OLLI at Arizona State University. A retired resident of Sun City Grand, Arizona, Phyllis has participated in numerous OLLI courses in recent years in addition to engaging in extensive travel. She was an active participant in the Community Research Team.

**Lou-ellen Finter** is a retired educator with interests in music, prehistory of the American southwest, and research. A volunteer instructor for the OLLI at Arizona State University, she also leads educational tours to destinations throughout Arizona. Lou-ellen is a member of the Community Research Team.

**Ralph Shattuck** worked in finance and data processing with Intel and IBM and then founded several financial services and real estate firms. He is a member and volunteer instructor at the OLLI sponsored by Arizona State University. Ralph is also an active participant in the Community Research Team.

**Vincent R. Waldron** is professor of communication studies at Arizona State University. He was the founder of the OLLI at ASU and now serves as its faculty research director. Vincent facilitates the Community Research Team.

**Don Zimbrick** is a resident of Sun City Grand, Arizona, where he participates in the OLLI sponsored by Arizona State University. A retired international educator with teaching experience in Russia, Saudi Arabia, and other countries, Don was an active member of the Community Research Team.

Our preliminary research yielded a rich taxonomy of potential reasons for nonparticipation in our lifelong learning program. These factors may apply to programs in other regions as well.

## Life Stories, Autobiography, and Personal Narratives

**Robert Atkinson**

**W**hy would we want to harvest the deep stories we all carry around within us? How can we turn these stories into lasting legacies? These questions would take at least a book to answer, which is something that is currently—and pleasantly—occupying much of my time these days, but one thing I can say for sure right now is that our stories are who we are. In fact, not only is the second half of life a time for reflection and reviewing our lives, we could also say, as Wayne Muller has, that the heart of most spiritual practice is simply remembering; remembering who we are, remembering what we love, and remembering what is sacred, or most true, to us. This practice brings our journey full circle. It tells us that what remains must remain. It helps us be grateful for what we have and the way things are. Gratefulness emerges naturally from the experience of finding the enriching balance of honoring both our joy and sorrow in story.

Life is a mysterious quest that we may not even realize we are on until we allow ourselves to stop, or slow down, and make sense of all that has happened. There are moments of meaning that may only find points of connection as we put them together in the story of our lives. In this second issue of *The LLI Review*, we continue our regular section of the journal with two more engaging life story reminiscences of lifelong learners who illustrate for us how connections are made, how meaning is found, and how purpose unfolds.

With the perspective of life as a whole, mysteries become clearer, patterns become recognizable, and themes emerge that give a depth and eternal quality to our stories. Here we have two remarkable lifelong learners who have much to tell us not only about how and why to remember the personal stories that lie beneath the surface of our lives, but who also give us models of how we can leave for others a legacy of what is most important to us. Given the opportunity, these two life storytellers found their expression of the unique, the universal, the fleeting, and the eternal that has made them who they are. They are very aware of having acquired a heritage from those who came before them, and here offer a legacy for us, and others who come after them. Both are also published authors of their own stories.

When I first heard that Sophie Freud might be one of the lifelong learners

telling her story in this volume, I was immediately pleased and excited by the possibility of meeting her—not to mention sitting with her and listening to her tell her life story directly. As a professor of human development, I was quite familiar with the legendary and pioneering work of her grandfather in the field of psychology, and I was also somewhat aware of her own contributions to the field of social work. She indeed was a wonderful, gracious hostess as we discovered we were kindred spirits in many fascinating ways. I thoroughly enjoyed my time with her in her comfortable, welcoming home, and became enthralled in listening to her magically unfolding life story.

Born in Vienna, she got to know her grandfather, Sigmund Freud, as the older family patriarch through her regular Sunday visits with him. In 1938, when Germany annexed Austria, the entire family emigrated, with her and her mother making a series of harrowing escapes, first to France, then Casablanca, and finally to the United States. Unfamiliar with its standing, she attended Harvard College, while still struggling to learn English. Now professor emeritus at Simmons College, she has had a distinguished career in social work and has become internationally known in her field. *The Boston Globe* wrote of her: “She may be a Freud, but Sophie Freud is not a Freudian.” She continues to teach, at the Brandeis OLLI, and write essays and books.

Harry Sky has been a friend for most of my 20 years at the University of Southern Maine. Our paths have crossed in a number of ways. His life story, through an interview carried out by one of my students in 1990, became one of the early contributions to the archive of the Center for the Study of Lives. Our common interests in diversity and social justice, Jungian psychology, and religion and spirituality brought us together many times, too. But, as I was reminded when I sat with him and listened to an update of his life story recently, his life and his actions have touched thousands beyond mine.

From a family of rabbis in New Jersey, who were originally from Latvia, as a child he grew up with a thirst for folklore and mythology and as a young rabbi acquired a passion for social justice. After a 35-year-long distinguished career as Rabbi of Temple Beth El in Portland, Maine, Harry Sky founded Senior College at the University of Southern Maine, which later became the first OLLI, now also the National Resource Center for the OLLI network. He is the recipient of many awards and honorary degrees as well as the author of *My Journey* (2003) and *Give Me Two Minutes of Your Time: Let's Have a Conversation* (2005).

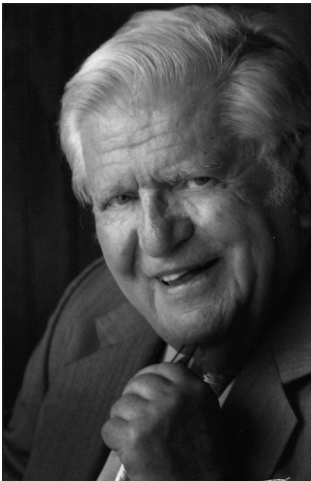
Listen with your inner ear for the truth these wonderful life stories carry. They tell us much about the formation of meaning and purpose in life; we have much to learn from the record of their lives. Think, also, of others whose life stories you would like to see in these dedicated pages of future issues of *The LLI Review*, and let us know. They will all become part of a growing collection of life stories, autobiographies, and personal narratives not only in these pages but also in the Center for the Study of Lives archive on the OLLI National Resource Center's Web site.

**Robert Atkinson** is professor of human development at the University of Southern Maine and is associate editor of *The LLI Review*.

With the perspective of life as a whole, mysteries become clearer, patterns become recognizable, and themes emerge that give a depth and eternal quality to our stories.

## Keep the Sense of Soul Going

**Harry Sky**



*Harry Sky*

I should begin with who I am and where I come from. Just two summers ago, I went with David Trobisch to Germany. The purpose was to try to introduce a book that the two of us had jointly written. We visited a couple of churches, and now the book is being translated into German, and we're going to go to Germany again in the fall.

We took one whole week and traveled the entire Rhine valley. For me this was very important. First of all, we know from history that the first major Jewish settlement in Europe was in the Rhine valley. The Jews who came there were people who were brought there by the Romans, for various reasons. For instance, if you survived 30 years of [military] service, then by Roman law you were entitled to an acre or acre-and-a-half of land in the Rhine valley. That's how the Jews got there.

We went all around the valley. One of the interesting things we discovered was that Hitler visited the valley once in his entire career. He had such a lousy reception that he never came back again. The Jews who lived in the valley were taken off to the camps, but many of them managed to survive. They were tipped off and they managed to get away before they could be incarcerated, or the German spirit was so strong that after the war they came back.

As we went up the valley, my interest grew. In my father's library were the writings of Judah the Pious. He was of that first generation of rabbis who interpreted the Talmud once it was completed. The major interpreters were in the Rhine valley. He was a very spiritual guy, and he was a prime example of taking things that were mythological and concretizing them. He came out with a codebook of his own. My father paid more attention to that codebook than to the codebooks of the mainstream! He knew all the codebooks of the mainstream, but he felt that there was greater strength in that one.

Our family name was spelled S-K-U-J-A, Skoo-jah. For years I couldn't figure out what it meant. Finally I found someone who told me what it meant! That there was a town called Skuj in Latvia, and "a" means "from," and there were the Jews who settled in Skuj. They signed their name: So-and-so Skuj-a. So-and-so from Skuj. It later became Skui as a family name.

Why did they go to a place like Skuj? Where did they come from? The puzzle

was answered for me when I finally figured out what was the power of this Judah the Pious. He served in the area close to the Black Forest. Much of his folklore was Black Forest folklore. And the Black Forest tales from childhood always rang true in my heart. I knew folklore from all over the world, but nothing had the power over me as did the Black Forest stuff. In fact while we traveling through the Black Forest, David Trobisch tells me, that he was trying to talk to me and I acted as if I didn't hear him, but my mouth was going. It's as if I were carrying on a conversation with invisible characters. It was an amazing experience.

So with that in mind, you can understand me a little better than just looking at my face. Because as a child I took very seriously the tales my father would tell. To me they were the happiest part of my life, because it gave me an anchor. I felt that I belonged to something. All my life I've been trying to bridge the texts with the space that I took for myself.

As you know, I've been living in Maine the major part of my career, because I was a rabbi at Beth El for 35 years, and here it's 17 or 18 years later and I'm still functioning in one way or another as a rabbi in this community. So it's almost as if I've been functioning here close to 50 years, or half a century. When I came to Maine I really felt I found myself, because this was a place where you sensed in the air the tales of the forest, the folklore, the allegory, the feeling of going inside, finding the soft spots, and seeing who is the guardian of that, which is what the fairy tales are all about.

So with that introduction, I can tell you about who I am. Without that, you'd never know who I am. You will find that in the course of my life I've done things that are not mainstream, but they are more in-stream. I'm turning 83 in a couple of weeks!—I still sense things popping up from the deepest places—in my dreams! Of late, I've been going on Sunday mornings to the Friends meeting, to the Quakers. What do I like about it? The quietness. When you sit in that period of quiet, you can hear your inner voice. In my tradition, in the mainline Jewish tradition, that didn't happen.

In Hebrew school you have a much more rational approach. I run into a lot of other rabbis that are into the mystical stuff, but they're considered off beat, just like me. I knew this even as a child. I'll tell you a story. This was my first that I attended after my ordination. I was sitting at a table with a very famous rabbi, he's now deceased, by the name of Jacob Agus, and suddenly I found myself talking about all kinds of mystical things and I couldn't stop. He said to me, "Where did you get all of this?" I said I don't know. I just did.

Many times I will come up with an idea and it's in my journal and later on I'll read it in a book. I never read that book before. I think I'm remembering and I'm intuitive. It could be part of the collective unconscious. You know, Jung always said, "What one has, everyone has." Each one of us, once you're willing to listen to the spark of the Self, it's amazing the amount of information that you have. It's all there. My birthday was April 17, 1924, in Newark, New Jersey. My father was never very affluent; you know, he made a living. At first there was only my brother and myself. He was two years younger than me. Then about seven years later, my youngest brother came. That's all we had in the family, just the three of us, no sisters. My mother had a few relatives in town but we seldom saw them. My father had a sister and her family. He was very much involved with them.

...as a child I took very seriously the tales my father would tell. To me they were the happiest part of my life, because it gave me an anchor. I felt that I belonged to something.



## Keep the Sense of Soul Going

I went to the Newark public schools through the sixth grade. I wasn't a very well-adjusted kid. I wasn't very athletic. Somehow I felt that the school wasn't saying what I wanted to hear. It just wasn't my cup of tea. I was never very sociable. Unlike my brother who was very, very sociable.

My brother was quite ill when we were very young. We almost lost him. That had a profound effect on me and on the family. My mother was constantly worried about him. Many times I felt that there was more attention being paid to him than anybody else.

When my brother was two years old, and had pleurisy and double pneumonia, it was as if the worst things in the world had crept into our house. He was actually transfused on our dining-room table. The surgeon took three ribs out of his side to get rid of the pleurisy. Here was a four-year-old kid, and I'm watching all of this through the keyhole. Then, my uncle, the rabbi, was sitting at my brother's side, changing his name so that the Angel of Death won't know who he is! Saying you have to listen to the doctor, but on the other hand, you have to pay attention to the spirit. So when the doctor told my mother after the surgery, in order for him to regain his health, his strength, that she should feed him lard. Well, you can imagine what it's like in an ultra-Jewish home to be told to eat lard! My father wouldn't hear of it! They ran to my uncle. "What should we do?" My uncle said, "You know as well as I do, when it comes to saving a life nothing stands in its way. Go out and buy yourself a pot and a spoon, and only use it for that lard. Don't mix it up with your other dishes, and you'll be doing the right thing."

When I was trying to discover my identity, as an adolescent, I was a very sensitive kid. It never felt like I really belonged to anything. Once my father stopped with the stories I just couldn't belong to what he wanted me to belong to. Now I realize that. I didn't realize it at that time.

When I was about 12 years old my father sort of convinced me that maybe I'd be better off if I went to a Yeshiva in New York. I used to commute every week. For a while I lived in a dormitory, and for a while I lived with an aunt, in a private home. It was a very trying, troubled time for me. I really needed the home and my good family. Then I went on to another school, and then a third school. The middle one I identified with very much, because it was the place of stories, a lot of mystical stuff going on there.

I had great difficulty trying to discover who I was. In terms of as a human, as a Jew, as a male—I mean, all kinds of problems. I had a lot of help. I went into analysis at the age of 22. I stuck with it at least until I graduated from seminary. A four-year analysis with a Freudian, classic analysis, everything was on the couch. She was a very fine person. I went three times a week, forty weeks a year. I felt it helped. It gave me a sense of self, at least the beginning of a sense of self. I found as I went in more and more into the analysis that I let go of more and more things, that I was becoming more and more successful at what I was doing. Finally I was ordained, and then my first congregation was in Gloucester, and I would go to Boston to see an analyst.

I entered the seminary in '46 and I had my first pulpit in '48. This period of time was right after World War II. I was involved in protest meetings, and I remember towards the end of the war there was a rumor around that the Germans were ready to trade Jews for trucks. For a truck you'd get "x" number of Jews. There were

some people who picked that up and there was a real effort to raise a fantastic sum of money to buy as many trucks so we could possibly get as many Jews out.

Those years touched every one of us. It was wrenching, absolutely wrenching. Especially when you were reading every single day something else was going on. We knew terrible things were happening but who knew the full dimensions of it. How could you? But we knew.

My first experience with someone who managed to get away was about 1938. I was 14 years old. One Friday night, a man appeared in our Synagogue. He had come from Vienna and he had lived in that section of Vienna which was the most heavily populated Jewish section, 15-16 Bezirk. I remember that scene back in my mind's eye right now, walking home from Shul with him, telling me how he had to give up everything to get out.

At the time I didn't understand what he was talking about. But later on I read what was done to strip the Viennese, the Austrian Jews, of their possessions. I mean, Eichmann was there. You'd come in, first thing, you'd come to a table, you show them your pass. They took it away from you. Then you had to give them an inventory of everything you had. If you lied, if they caught you lying, you were shot. Then you had to turn in whatever radios you had, whatever jewelry you had, whatever could be carted by hand. By the time you were at the end of the table, you had nothing. All you had was the shirt on your back and your passport and maybe ten shilling. So when he came to this country, the Jewish community was organized. No one was left hungry. They were taken care of. We found jobs for them. We found an education for them.

In 1946 I had a fantastic experience. I had entered the seminary as an auditor in January of '46. I had gotten through Yeshiva in '45 and I took some time off, preparing for seminary. In June of '46, one day, I walked down Broadway, the seminary was 122nd, down to 100th St. to a Kosher restaurant for dinner. I sat down at a table and there were two young people sitting opposite me. Young, yet they looked old. There was something weird about it. And I don't know why, to this day, I can't tell you why, I automatically struck up a conversation with them in Yiddish.

At the Yeshiva, I spoke in Yiddish only when we were studying. Not conversational. As it turns out, these two people were a brother and sister. They had arrived in the United States just that day. At the end of the war, President Truman went beyond the quotas and allowed 1,000 displaced persons to come from Europe to the United States. They were a part of that thousand. They were housed in two hotels in New York. One was the hotel Marseilles, which was just three blocks away from that restaurant. That's why they were eating there.

This kid is sitting there and he takes out his wallet and he takes out a bunch of photographs that he took. They had piles and piles and piles of corpses in the trains, the unburied mounds of people. I don't remember all the details, but this left such a horrible impression. I went back to the hotel with them. I had never seen such turmoil in my life.

There were some social workers working with them, but these people were so agitated running back and forth, back and forth, back and forth, not just these two people, but everybody else that was there. There were others, too. Finally, one of them gave me a list of names of people who were still looking for relatives in the United States. Well, I called these names into a Yiddish newspaper. We brought

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some of the D.P.'s over to the seminary. We took them to a Russian movie. Boy, if anything opened my eyes to what those horrible years were about. They started telling me these stories.

One kid, 16 years old, looked like a dwarf. Why? During the whole time, he was hidden in the cellar. Never saw sunshine from 1939 to '45, from the age of 10 to 16. He was lucky to survive. I met a woman and her daughter. They looked pretty, blonde and as Nordic as anybody could possibly be. The two of them had passed in Poland for non Jews. That's how they survived. I mean stories, and stories, and stories, you know, during this Holocaust. And now, I think there are memories. What can I say? These are very personal to me.

I feel like I contributed to things like that not happening again. I think becoming involved with civil rights. There's no such thing as saying that this one has a right to live and that one doesn't. I don't buy that.

During Yeshiva years I was allowed to socialize with females, maybe towards the end. The real attraction was my wife. I met her in 1949. I must've been about 25. I had gone to a Zionist young adult camp in New Hampshire, Tel Noar. Many of us seminary students went there. We were all doing different things in that camp but they didn't give me any assignment. After a week I was bored. So I told my friend that I'm going home. He says "Don't go." There's a woman coming today, Ruth Levinson. She's for you. Okay. So I started walking back to my bunk. And there, unannounced, sitting near my bunk was this woman. I didn't know her name although she knew mine. And I sat down, struck up a conversation with her and before I knew it, I had asked her out that night and she accepted. I was so struck with her that I proposed to her two days after I met her. A month later she accepted. We just hit it off. Somehow or another, you know, whatever could've been different about her, I liked. Whatever was different about me, she liked. That's what did it.

I have three children, a daughter and two sons, and two grandchildren. We were married in December of '50. My daughter was born in August of '52. For the first 6 months we rented part of one of these New York townhouses, 85th Street near Central Park West. In those days they were buying up these mansions and breaking them up into many apartments. It was a nice place except it was kind of crowded, everything was in one room. Whatever money I was making in those days paid for my analysis. I was doing some teaching. I taught in a Hebrew School. That's where I made money.

The big thrill for us was Saturday night walking down Broadway, 72nd Street, where there was a newsreel. We'd stop in every store and look inside and say "When we have some money, I'm going to buy this and when we have some money I'm going to buy that," you know. Those were the days when television just began, so for 25 cents, we'd go in, we'd watch the newsreel, and we went downstairs in the basement and we'd see Sid Caesar. So, between the newsreel and that it was almost like a three-hour show. Then we walked back up Columbus Avenue. And every single Saturday night we'd buy ourselves a big piece of cheesecake at Delmonico's and have it for breakfast the next morning. That was a big thrill. Those were the real good days.

I've been here in Maine since '61. It took quite a few years before I felt like I'd made it. I think it took at least 10 years. In those 10 years, little by little I was earn-

ing more. I was already a rabbi. I had positions. By the time we came to Portland, my daughter was nine years old, and things had freed up a little bit for us.

I think I planned on becoming a rabbi ever since I was a kid. I think it took a different turn from what I had originally planned it to be. On one hand the tradition meant quite a bit to me but on the other hand, I was always asking questions. Established norms were the things I followed, but on the other hand I raised questions. That's the way it went.

I accept the old mystical tradition that within each human there is a divine spark. If you read the Bible, it says that. God blew his breath into the human. I think that has continued through the ages. That spark is the soul. That spark is almost like what you should be. There are no two sparks alike.

I was one of the first to feel that something has to be done as far as women are concerned, for equality, both in terms of the tradition and the ritual and ultimately in their becoming rabbis. I fought some pretty strong fights over that one.

I was on the law committee of our rabbinical organization. I raised questions there. I wrote some papers. But I think the most important thing for me was not so much those questions but once I came to Portland, I'd seen possibility of having some kind of effect on the general environment. I became involved in causes quite early.

First it started with human rights, then civil rights, then with the Maine Human Services Council, with discrimination in housing, making sure that something was done to winterize homes, setting up all kinds of funds, one was for food, another was for heating. Those were the things I got involved with. I've always been an activist.

I think it was from my understanding of what life was about. My father had his own way. I remember when we were kids during the Depression. He was a shochet at that time, which is a ritual slaughterer, you know, to provide meat for the kosher, those who want to observe the dietary laws. The fowl and the cattle have to be slaughtered a certain way. He was also a rabbi, and I remember that he and the kosher butcher on our block every single Friday just before Shabat would go up and down the main avenue collecting money from every store keeper, 25 cents a week, I think that's what it was at the time, and then those funds were used to help neighbors who were about to be dispossessed, or their lights were being turned off, or the gas being turned off.

My father would prepare an envelope and my brother and I would have to go sneak it in under somebody's door because they shouldn't be embarrassed when we brought them that money. Only once did somebody open the door and that was very embarrassing. My father told me, don't let them see where it's coming from. When they opened the door they were astounded and I was astounded. Then they would deposit whatever was left over that week with the butcher so the people could get free meat and for the local grocers they could get free groceries. That to me was the norm.

I remember this was during the Depression. We lived in an apartment house and there was a big yard in back of the house and every so often you'd hear musicians who were unemployed, the most wonderful musicians you've ever heard in your life, violinist, clarinetist, trombonists, all sorts of musicians playing, hoping somebody would throw them something. My mother always had change which she saved for that.

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Well, you see, there was a different atmosphere then. We were in a depression and there was no one who really wasn't hit by it. If you had a little bit, you shared it with somebody. There was no such thing as the welfare system. The welfare system came later. In those days it was neighbor taking care of neighbor. That's always been my policy. Neighbor has to take care of neighbor. That's how I came around to all these causes, through this notion.

I was the first one to raise questions about the women being segregated, and much deeper questions. Women should be part of the service, they should be taking part in the Liturgy, they should be allowed to conduct, they should be counted as part of the minyan, they should be the Torah readers, they should be the rabbi, they should be the cantors, those kinds of questions.

I was very much involved in the social changes of the '60s. I was involved with civil rights, Vietnam, the hunger issue, the housing issue. I was president of the Inter Faith Council.

I was part of the March on Washington when Martin Luther King spoke. I was standing right near him at the Lincoln Memorial. He was standing on the steps and I was sitting at the bottom of the steps, about 50 feet away. The speech was an overwhelming experience. The man was a masterful speaker. He was able to put into words things that others couldn't. And he really caught me. Suddenly it was as if a cloud had come off of my eyes, and I started looking around at the audience and the blacks that were sitting there. I felt as if they had features I'd never seen before. It was almost like a revelation.

Then I came back to Portland and got caught up. I helped organize the NAACP. I was involved with all kinds of things having to do with civil rights. That led to other things, you know. When you start talking about civil rights for blacks you start talking about it for everybody. Wherever there was a minority, a group that I felt didn't get a fair share, I thought that's what civil rights was all about. Everybody has to have an opportunity. That's the whole point.

So, real change for me came about after I was living in Portland for a while. I became involved in holistic medicine, which in itself is a mystical notion. I mean, how do you define what is holistic? How do you know if you've really taken care of the total? Do you really ever know everything? You can't! I was caught up in it.

This led to my going to Zurich, and my becoming involved with the Jungians. By the time my first wife died, I was speaking to a Jungian analyst once a month in Switzerland and going and visiting him for at least twice a year. This went on for maybe thirteen, fifteen years.

The reason why it clicked the way it did was because Jung comes from that same space. One of Jung's great dreams—that he never understood until his midlife years—was this dream when he's sitting in a stroller, and the nanny is pushing it. They come to a place where there seems to be a hole in the ground, and he strains and sees that there are steps going down into hole. There is a royal blue carpet stretching from the steps to a little platform that is just above the ground. On this platform there is a throne, and on the throne—this is one of his famous dreams!—on the throne is a phallus. For the life of him, he couldn't figure out what it was all about! It kept on coming back to him, and back to him. When he was very active with his practice, especially the clinical part of it, it was in the back of his mind. But when he began to deal with his own issues in midlife, it suddenly came to mind again. And he came up with the greatest of all theories in all of this business of the

analytic approach. Freud had said: ultimately everything comes back to the sexual impulse. Jung says his dream told him: everything comes back to the creative impulse. See? The phallus is the symbol of the creative impulse. Not just the sexual. And that was revolutionary.

All of this comes from this whole folkloristic approach in my life. I think that it has prompted more positive things that I have become involved in than any theory that I have read anywhere. Whether it was civil rights, whether it was the handicapped, whether it was for senior citizens, women's rights, gay rights, whatever. It all comes from the folkloristic notion, which is first, that we all have within us the spark of God. The form it takes, no one can predict and no one has the right to judge; second, every human is a potential creator. You don't dismiss anybody. You don't tell so-and-so, "Well, you didn't come from the right class," or "You didn't come from the right neighborhood," or "You didn't go to the right school." And third, we are all linked with each other. In one point in my analysis, my analyst said to me, "You are not linked enough to nature. Go outside and start playing in the dirt."

It's this linkage business that I'm always talking about. In fact, I've come to the conclusion that the Hebrew word for love—which is *ahav*—means link! L-I-N-K. Link yourself, one to another, so that you all become one big chain. Whether it be with God, or with the humans, or with nature.

It's this linkage that goes back to the more mystical. You know, first of all, the area where the Bible was written, how far is it from the Himalayas? I mean, the latest theory is that the first monasteries were peopled by Buddhist monks who crossed the Himalayas and came into the Fertile Crescent. Corinthian scriptures were found on rocks. I'm very much at home with all this stuff. If you pay attention to the early Hasidic literature, not the modern stuff, but the early Hasidic literature, you could just hear the Buddha talking, you can hear Confucius talking, you can hear all of those voices talking.

It's been within the last ten, fifteen years that I have sensed this. It was in that first course that I gave in Senior College, which was: "Spirituality as Seen Throughout the World."

Senior College was an outgrowth of where I was going. I mean it was really a fluke the way Senior College came about. President Pattenauade wanted me to be on some kind of University of Southern Maine community board. He had spoken to my late wife, Helene, and had said that he would like to meet me. We had never formally met. So she brought me the message, and I made a telephone call and we met. I said, "Ok. I'll serve."

Then I said, "Well, you know, there are many people like myself who are now retirees. Our heads are still working. Our curiosity is as strong as it ever was. And we'd like to have a place where we can come and study, peers with peers, without credits, without degrees, without papers, or any of that stuff."

"Ah! Interesting idea. I'll think about it," he said. I was after him for three years until one day he says to me that he spoke to his mother about it, and she thinks it's a good idea. That's how it began.

In the early days there was not much of a definition to it. First of all, President Pattenauade was very nice about it, but he didn't know what to do with us! We didn't fit in! We weren't undergraduates! We weren't going to follow anybody's cur-

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## Keep the Sense of Soul Going

riculum. Thank God we've worked out a *modus vivendi*, things that are the University, and the things that are ours. No one has come along and told us: this we can teach and this we can't teach. That's why everything under the sun has been taught in these ten years, from one extreme to another. Nobody censored anybody.

We always had a board, or whatever you wanted to call them, a council, from the beginning. The first board was very fascinating. It was all personnel of the University. Not people who were that interested in Senior College. So right away we got a message: control.

I was asked to be the chair. Okay, well, I knew right away that we had to have some money to get things going. So I called up Selma Black, she was always an advisor of mine—very close to me and to my wife. I said, "Selma, what should we do?"

She said, "Very simple. You find 20 or 30 people who will give you \$100 apiece, and you'll have enough to get going. I'll give you the first \$100," she says. So I went around and I got it from this one and that one, this one and that one. Shep Lee gave us one hundred bucks. He said to me one day, "It's the best thing that's ever happened in Portland, this Senior College. People like myself now can continue to feel as if they're still alive!" And that was the whole idea.

We went to Harvard; we saw their model. We went to North Carolina; we saw their model. And we came to the conclusion that the best model for us would be peer teaching peer. I mean, some people say, "Well, we should pay them!" No, no, no.... Volunteers. That's the way it is.

And it's been a very successful thing. I mean, the way Barney Osher came on board is a story in itself. His brother had died, and I officiated at the funeral. After the funeral we went back to the widow's house. So Barney asks me, what am I doing these days? And I told him about this idea I'm having. So he got ahold of his brother, Harold, and asked Harold to come visit him in California. While he was there, he pumped Harold as to what was going on, what was this all about. Harold was very positive about it.

The next thing you know, negotiations began. It turns out he gave a quarter million! Then for a year's time, he watched us very carefully. There were constant visitors coming from California to see what we were doing. He was convinced that ours was the model, and he began to drop Johnny Appleseeds all over the place. So we now have over 100 OLLI sites throughout the country, and 16 Senior Colleges in Maine alone.

Because of the OLLI network that has developed, so much has happened. Senior College was the stimulus for all this. And USM has gained much prestige because of what's been done.

You see, you and Mike long ago understood the need for post-retirement education. You got involved. My wife, Helene, got involved in that too! The course that she gave was: "Writing Your Lifelong Story for Unborn Generations." All of this caught on. Suddenly older people began to feel: "Hey! It isn't over yet!"

I had a father who never stopped learning. As old as he was, as sick as he was, a day wouldn't go by when he just couldn't make it, he could hardly breathe, but he knew when he went to his bookcase and he took out a book he became immersed in what was in that book and all of the sudden his disease was gone.

I'm finding this at this stage in my life too! You know, there are times when I

get blue: What's going to happen? I have no family left. In case I get sick here, who's going to take care of me? All that stuff which you would expect older people to have. I start writing, I start reading, I go on the computer. It's as if it never happened. There's something about learning. There's a saying in the Talmud: "If someone feels something in his head that things are not right, then get involved in learning."

That's the way my whole life has been. I have right now on my writing stand, one paper that I'm writing, three or more that I have to do... Every ten minutes, twenty minutes, I run, "Oh I have another thought. Then I should write it down." That's what keeps me going. Otherwise, you know, you have a pain here and a pain there, and you don't know where it's coming from. The next thing you know, you're imagining the worst. And you're up in the hospital. Because around here, as soon as you complain about something, "Oh! 9-11! 9-11!" Off you go.

I'm glad my life was mine. I've loved everybody I've really had something to do with. That's why I think things worked out the way they did. Every so often, I get a little angry with somebody. But I think I had the capacity of forgetting. I think I have something working inside that wipes it out. Just won't let it stay there. The things that do remain, the negative stuff, oh, that can drive me crazy, until I get rid of it. But most things, I forget.

My social action motivation was really my father's model. The other things evolved. There must have been something inside of me waiting to come out, and when enough of the garbage was removed it did emerge.

I would say look for the self that's really you. That's the God within you. Once you're in tune with that, then it's much easier for you to follow the path that's really yours, and not be constantly responding to the world that's around you, but rather to the world that's within you. That's the key.

The cross-fertilization that takes place in lifelong learning is wonderful! I think older people should continue doing what they're doing, and realize that the more you keep the mind going and the spirit going and the sense of soul going, the better chance you have for a long life. If you stop looking for pills to calm you down, and you start looking for thoughts to calm you down, you might go further.

I'll end with a little story: A woman came over to me one day in Senior College. And she says, "Rabbi, I want to tell you something."

"Okay."

"I went to see my doctor yesterday."

"Oh?"

"He looked at me, and he says, 'Oh, Mary. You look good. What have you been doing lately? You haven't looked like this for a long time.'

"Oh, well, I decided I didn't want to be a couch potato anymore."

"Fine. So what are you doing about it?"

"Well, I volunteer, and I go to Senior College."

And he wants to know what Senior College is, so she explains it to him. "Oh, very nice, Mary. Keep it up. It's doing you a lot of good! I hope to see you in a couple of months."

As she's leaving, she sticks her hand into her pocketbook, takes out an envelope full of all of her pills, gives it to the doctor, and says, "I don't need this anymore." And off she goes. We both had a good laugh over that!

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## It Takes Many Miracles to Make a Life

### Sophie Freud



*Sophie Freud*

One of the things that encouraged me to write my book, *Living in the Shadow of the Freud Family*, was that I found—I actually knew there was—in my mother’s estate the 40 letters that my mother wrote my father during the period that he was prisoner of war and she was waiting for him to come back. That was how their courtship started. I felt that these letters from her, from WWI, needed to be preserved in some way, which led me to the need for a book.

It took me eight years to write this book, which I did want to write before I die. I’m pleased that at least I could reach this goal and I loved doing it.

I was born in Vienna in 1924. That was a long time ago. I had the experience of being born into a family that was to become famous. My father was the son of Sigmund Freud, and my mother came from an affluent assimilated Jewish family. Father became a prisoner of the war at the end of WWI. My parents married right after the war ended and father had come home from Italy. The marriage went downhill very fast.

I lived the first 14 years in Vienna. In some ways, you know, there is so much misery in the larger world, in Africa where people have nothing to eat, no place to live. In comparison, I had a very privileged childhood. Everything is relative, right? I had a privileged childhood in comparison with the majority of children in this world, but I did not grow up in what one would consider a very peaceful home.

My grandfather was old by then, and sick. He gave me and my brother maybe ten or fifteen minutes’ audience once a week to look us over and ask a few questions. It was a formal but very important and benign relationship. These grandparents kept an eye on the tumultuous household that my mother and father had created. There was his protective presence even if I did not have that much actual contact with my grandfather.

When the Germans invaded Austria, it was all left up to my grandfather whether we would emigrate. Now, I don’t understand why it was all up to him, because I had a brother who was then 17 years old and actually in immediate danger. When grandfather decided to emigrate, the whole family got visas with him, allowing us to emigrate quite early. The Anschluss was in March 1938 and we left

Austria in May, one of the early departures. The persecution of Jews had started instantly and in November the Nazis organized the first major ugly pogrom in Vienna later called the Kristallnacht. You must have heard of it, the night of broken glass. We were spared that experience.

My parents decided to immigrate to different countries. My father thought it was a good opportunity, I think, to get out of the marriage so he and my brother went with my grandfather's family to London. My mother and I went to Paris. The family split up at that point. My mother had sisters in Paris. In my first book, *My Three Mothers and other Passions*, I wrote about my aunt, my mother's sister, who welcomed me to Paris. I saw her as a second mother, who really helped me a great deal at that difficult time of transition, which would have been much harder without her. She was a scintillating colorful woman. She also had a bad marriage, but she chose to stay with her husband.

I then went to school in France, to a regular lycée, the public school, and tried to learn French as fast as I could. I'm not that gifted in languages actually, I have especially no talent for new accents, but I did manage to catch up. We arrived in Paris in May 1938. Then in September 1939 this strange war started. I mean, during the first year nobody could have observed that countries had declared war on each other. Both sides stood still and prepared for war. They called it *une drôle de guerre*, a strange war.

In the spring of 1940 the war really started, and my mother and I left on bicycles just two days before the Germans invaded Paris. The trip across France became one of the big adventures of my life. We ended up near the coast, near Bordeaux. I kept looking back to see if the German army was behind us, but they must have taken a different route.

We stayed that summer in a village where I learned to make bricks and read all the French classics. The armistice had divided France into an occupied zone and a non-occupied zone. Luckily we stopped in a non-occupied zone, but it was a frightening situation, given our status as Jewish refugees. In the fall we went to Nice, which was not occupied at the time, and I was able to return to school in Nice.

I worked very hard to become a good student there. In Vienna I had been very lazy; I had only been interested in my friends and having a playful time. In Paris I was busy learning French. But then in Nice I wanted to become a really good student. I don't know how I got accepted at the public lycée because at that point Jewish children were no longer admitted to public schools in France but somehow, in spite of my being not only Jewish but foreign, I was admitted. I still don't know how this happened. All the teachers were very nice to me and they were super-fair, you know. I received prizes and academic honors, so that is a happy memory. I wrote about this in my book; I wanted to be sure to include what good grades I got.

My mother's sisters, who had lived in Paris, were by then in New York and helped us to get visas. We arrived in Nice in September of 1940 and left in January 1942. It was very lucky because the Germans invaded all of France soon after we left and we got away just in time. It was around the same time that America declared war. So we thought, "maybe we don't have to leave."

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## It Takes Many Miracles to Make a Life

We almost didn't leave because we were used living in Nice. I loved my school and desperately wanted to finish my French baccalaureate. My mother had found some work in her field and was very afraid of poverty in America. But, fortunately, we did leave. A dear friend who stayed behind later got deported to Auschwitz.

We went from Marseilles to Casablanca, where a Portuguese ship was to take us to America. It was the only way to reach the U.S.A. at that time. Then a strange thing happened, that gave me several chapters in my book. The ship was delayed by a day and by the time it arrived, our American visas had expired. We had to wait in Casablanca for new visas for eight more months.

Being in Casablanca was a very happy time for me, the happiest time in my adolescence, the only happy time in my adolescence because I was invited to live with a local Jewish family who had a daughter of my age and who had many friends that she shared with me. I was even able to take and pass my baccalaureate examination. Finally we got the renewal of our visas. We flew to Lisbon—the first flight of my life—where we waited for another month and arrived in the United States in November 1942, starting my American life at age eighteen.

My mother settled in New York City where her sisters lived. All through, I was completely focused on getting a university education. I tried to get into Hunter College, but my mother was not yet established as a resident in the city. Once again another miracle happened, and Edward Bernays who was my grandfather's nephew, came to my help. He sent me to Radcliffe College, paying the tuition and everything, because we came without any financial resources to this country.

So I started at Radcliffe College which merged with Harvard while I was there. I landed in this prestigious University without knowing anything about its reputation. All I wanted was to continue my education. It was a really hard time, because first I had no money, and second, I didn't know English well enough. I knew it enough to get by, but not to really succeed according to my standards. It took me a while to get established. It was hard. It wasn't, you know, about having a good time in college. It was about survival, and managing to pass the courses and so on. After a while it became easier and I was able to graduate with honors. It took several miracles for me first to get out of France alive and second to get this education, which I wanted so desperately.

Many American boys wanted to go out with me but I was not going to date any strangers, so I didn't accept any dates with American boys. Instead I married quite early a German immigrant whom I had known in France as a way of, you know, having some island of familiarity in this strange new country.

I got married in my senior year, and of course finished college. My husband, Paul Loewenstein, served in the Navy at the Washington Naval Research Lab. I applied to social work school and got accepted at Simmons, and we moved to Boston after his discharge. Simmons was a stronghold of psychoanalysis at that time. All our teachers were psychoanalysts, something I later changed when I eventually joined the faculty.

I finished social work school, had one year of experience, a job at the Boston Family Society, and then I had my first child. I had wanted to have some basic work experience before starting my family. Eventually I had three children, but went back to work, on a part-time basis. It was a busy life, between raising the children, managing a household, and part-time work, which I increased as the children got

older. My jobs were connected with parents and children. I had jobs in child-guidance clinics and worked for five years as an adoption worker in a child welfare agency. I also worked a few years at a mental hospital for children. Because of my own experience of how difficult the relationship between teachers and parents could be, I ventured to launch a course that would help teachers of young children deal with parents. It was my first course. I made up a syllabus—handwritten at that time—and contacted the head of the teacher training department at Tufts University. They said, “Sorry, but we have somebody who is teaching something similar. If you want to teach one class, we could arrange that.”

Then, that very teacher who was teaching “my course” got sick, and they needed a substitute. This was yet another miracle that started my teaching career.

As soon as I was teaching my first class, I knew that I had finally found my true calling. You know, it was very strange, the students responded enthusiastically. They must have realized that it was my first teaching experience but it went very well. I stayed with Tufts a number of years, until I started to teach full-time at Simmons. I devised different courses around children and parents, but I still remember that first course because it was such a crucial experience.

Then when my oldest child went off to college, I also went back to school. I went to the Heller School for Social Policy at Brandeis University, conveniently close to home and very easy to reach with my motorscooter, obtaining a Ph.D. in three years. It was my entrance to a teaching career.

Happily, upon graduation, I was offered a teaching position at Simmons. They even made me chair of the human behavior sequence. It was a perfect fit for me. The faculty member who had been in charge of the human behavior sequence before me had not taught himself, but he had hired psychoanalysts to do the teaching. I said good-bye to the psychoanalysts, revised the entire human behavior sequence, and took over with my own teaching, turning the school in a somewhat different new direction.

Some faculty members were very angry, but on the whole, I had a very satisfying career at Simmons. It was really a very positive experience. I got along with most of my colleagues and my students; you know, ups and downs occurred, but they let me do what I wanted.

I had an impact on the school with the series of new courses that I developed, expanding from psychodynamic theories into systems theory and we went through the lifespan of families, not just individuals. I taught many different things at Simmons. I taught group therapy and family therapy, and I made sure that I got extra training in all these areas.

The children grew up. I was very busy with academic pursuits, but my husband enjoyed sports. He went skiing or sailing every weekend while I had to write my papers and book reviews, so we grew apart. After 40 years the marriage had really broken down and we parted, peacefully, but we parted. He sadly died a few years later.

In that realm, I was less competent than in my professional life. In my personal life I was so focused on academia, developing courses, writing papers, giving workshops throughout the country, that I neglected our relationship and did not take the time to nurture my marriage. I made a choice. As I told you, in France I wanted to stay in Nice, blind to what was going on around me, just so that I could

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## It Takes Many Miracles to Make a Life

continue my education. Many years later I was focused on my professional career at the expense of the marriage. I think that I did not neglect my children. I feel that I was a good enough mother but perhaps they don't think so.

I retired at the age of 68. I thought that I would work until I was 70, but Simmons at that time wanted to get rid of their old faculty and offered a generous retirement package. I took the package, retired, but then taught as an adjunct in our doctoral program for another ten years. So that worked out. I had created a challenging, ambitious course, offering two opposite viewpoints on every theory they were learning. Then I fully retired ten years later, in 2002, and I thought, goodbye teaching. I have to find a new identity.

I should mention that I had been so interested in teaching new courses, that I created a series of different courses about women's lives that I then taught at the Harvard University Extension Program in the evenings for about ten years. I had great success in terms of popularity. Year after year, up to 200 students filled the big lecture hall at Emerson Hall. Half of my "audience" took the course for credit and the other half came because they enjoyed my feminist ideas. They even brought their friends and lovers. It was exciting to go back to Harvard in this way.

I think I have some vibes that students respond to. It is part of my being. Perhaps it is my interest in the subject matter that is infectious. Anyway, it is something I can do that I'm not even quite aware of doing. Then there is this gratifying interaction. When you've taught a really good class, you have a high—do you? It is like an addiction and deeply satisfying. I was at that time a bit of a ham more than now. I enjoyed acting especially when I had these 200 people there, filling the hall. It felt like being on stage. So I enjoyed that part. But teaching is different in a smaller group, of course. In general different settings demand different teaching styles.

I was worried about giving up my identity as a teacher because it was such a central identity. I didn't have much beyond that. Even my love of reading was connected with using books for devising new courses. I was afraid of becoming useless and isolated. But retirement did give me the opportunity to finish writing the book about my mother's life and I loved doing that.

Actually the first thing that I did as soon as I retired, I enrolled in the program at the University of Massachusetts, in alternate dispute resolution, motivated by my longing for a more peaceful world. It covered conflict resolution through mediation, negotiation and arbitration. There were five courses in the program and I received a certificate. I wrote entire pamphlets for the papers assigned in the program. My poor teachers must have felt annoyed at having to read, for example, an 85-page paper on the reunification of Germany. But I did not pursue this any further although it was a very useful transition. I like to write papers and get good grades. I miss that at BOLLI.

Then I found the Brandeis Osher Lifelong Learning Institute program. I took a few courses, and they asked me very quickly whether I wanted to teach myself, and I eagerly agreed. Since then I have been teaching there. I'm back in what I've been doing all my life, but it's a bit of a defeat because I couldn't grow into some other life adventure.

Now I've found something that I call a "pass-time" in old age: to teach new courses and to take courses. But for me the teaching is more important than the learning, because I learn the most when I prepare a new course, although we do not

use teaching vocabulary. I am currently not a teacher, but a study group leader. I try to make my courses challenging and I'm always on the border of asking "study group members" to do too much reading. I have to watch that. But sometimes I watch it so much that I could have asked for more.

If I didn't have BOLLI, I think I would try to teach English as a second language, or try to look for other teaching opportunities. I was also considering as I retired to get another master's or Ph.D. in a different field. I even had an interview at Brandeis about taking a degree in comparative literature. I'm pretty sure that's what I would have done if I hadn't found BOLLI.

I'm not sure that I have a definite philosophy of teaching, but I have a few principles. One of them is to make sure each student has individual visibility. That's why here at BOLLI, I ask not to be assigned more than 20 students. I find that up to 20 there is enough time for each person's contribution. If there are more students, some will get lost. If they haven't said anything for a few sessions, I may suddenly ask, "what do you think about that?" I try to use and expand their thoughts in the discussion. I am pleased when I can manage to do that. The student then knows that s/he is appreciated. That is true for every age group.

Often people say things that I would never have thought about, and I give them instant appreciative recognition. I am by far not the source of all wisdom, you know, how could one be? If the class is going well, people bring in wonderful insights.

At Simmons and Harvard Extension in many instances, my obligation was to convey information. At the BOLLI program I try to be mostly a facilitator, so that often I give up what I would have enjoyed saying for the sake of giving members of the class more space. It demands discipline not to take over a class with one's own ideas.

I find that almost my main function is to invent challenging questions. Usually I send out questions ahead of time and then I might write them on the whiteboard, and let them be the class agenda. Sometimes one question may take a lot of time, if it involves complex ethical issues. Other times discussions go off on peripheral tangents and I exercise some control. I am invested in a degree of intellectual order in the classroom.

I think most of us enjoyed my last course a great deal. We read about how German authors look back at WWII. One of the first books, which everyone thought was fascinating was called *A Woman in Berlin* and it was anonymously written by a journalist who was there when the Russians entered Berlin and mass-raped the women. It was very well written, completely un sentimentally and without self-pity. I asked the group, "well, do we feel sorry for these women, or did the German women, who were among the main supporters of Hitler, did they have it coming?"

This was one of the moral questions that we debated. Not everyone felt all that sorry for these women. One class member who had been in a German concentration camp said: "my sympathy is limited." This is just an example of the deep moral questions that were part of the course.

In the second book an author was writing about his brother who died in Stalingrad. So again we had the issue of guilt and do we forgive the next generation? Each book raised a different difficult moral question. What went well in this

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## It Takes Many Miracles to Make a Life

last course is that there were definitely some sharply different viewpoints that had to be reconciled although everyone was respectful of each other. I might have said: "you can see how there are different perspectives in our group," and summarized the viewpoints of each side.

If the curriculum committee agrees, I shall repeat this course maybe in year or two, but meanwhile I am planning a new course, which I'm little worried about, for the next semester. I call it: "It was Hard to Grow Up." All the books we are reading are written in the first person about grim childhoods. Choosing the right books makes for difficult choices. The last course before that I taught about psychotherapy. That was an easy course for me, as was the German course, being very familiar with all the background for these books. The "growing up" course will be a challenge for me because I was not a literature major; literature is only an avocation. Some of the books are very grim and on the verge of being unreadable, such as the book about child soldiers. Another book is on the practice of foot binding a century ago, in China. I have to be clever and think of compelling questions.

At BOLLI we have a very sophisticated crowd of people. Most of the members are college-educated and many have advanced degrees. This is another area of privilege: to work with a group of people who are already well-informed and literate and willing to put in the time to prepare for each class. If they haven't done their reading they may feel guilty or embarrassed if I suddenly ask them for their opinion.

I send ahead readings and questions for the first class so that we don't waste a minute of our time. I like doing that since I hate waste of any kind.

I'll tell you one more anecdote of an experiment my students really enjoyed. It was a little unusual and I didn't know whether it would work. In the course "Psychotherapy for Better or Worse," we read Yalom's book *The Schopenhauer Cure*, in which he describes group therapy. I said: "we're going to have a group therapy session today. Half the class can be in the group and the other half are observers. Everyone can pretend to be who they want to be, nobody has to talk about themselves," but people did anyway. I didn't know whether class members would resent doing that, but they loved it and they still refer to it with pleasure.

In terms of advice, I'd say: don't underestimate your study group members. You can ask unusual things of them and they might go with you if you have established a climate of confidence and trust.

Each beginning of class I try to highlight last week's discussion. I secretly think of that as my personal time, my chance to express my own opinions but I also make sure to incorporate members' specific contributions, if memory serves me, even by name.

It was a very democratic and fruitful idea to create a system in which we can teach each other. The principle is really excellent! We've always had adult education centers, also in Europe. But this is a little different. It's the mutuality of the teaching and learning that is so special.

I have been very fortunate in my health, perhaps another miracle. I don't want to take credit for it, but a little credit in that I take exercise classes that I dislike, have never smoked, never touched alcohol, and I don't eat too much. I don't know if these factors make any difference.

One shouldn't take too much credit for one's successes, since one is not that much in charge of one's own life. We could have a bomb drop on us tomorrow and end our various efforts. Things that we have absolutely no control over happen all the time to everyone. One needs a lot of assistance from the fates to be able to lead a good life, a lot of miracles.

I think that one has only 5% liberty in how to control one's life. The other 95% is politics, economics, biology, and accidental happenings. I have always worked very hard, but I am only taking 5% credit for what I have been able to do, if I take any credit at all!

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## Autumn Novena

### **Loretta Petralis**

Day 1

A Sumac

poses in Electric Red and Yellow  
headdress feathers primed and proud  
like an angular Indian Chief in full regalia.

Day 2

Burning bush thickets

look like would-be beauticians  
tousled the tops of their heads with fingertips  
Adrip in Deep Magenta Stain.

Day 3

Beebee-sized Crimson berries

lace like needlework  
through the viscera of round topped ornamental trees,  
The kind that kindergarten kids draw.

Day 4

Growing down gray cement walls of the expressway  
are leaf blankets. Tapestries really.  
Delicately woven of Goldfish Orange  
Oxygen-rich Blood Red  
Tin-foil Tangerine.

Day 5

Sylvan monuments of autumn  
in Neon Orange and Deep Clover and Blackcherry Maroon  
meet Cerulean skies.

Day 6

Sunshine dapples  
urban streets and country lanes.

Day 7

A tall Oak

lays down a fragile

Copper-penny tinted carpet you can hear crackle underfoot.

Day 8

The spirit of summer past lingers

in a Cornstalk

propped upright against a lamppost

in wind-tortured rigor mortis.

Day 9

A Japanese Maple

cloaked in Cardinal Red

presides over the funeral.

"Yea, though I walk through the valley of the shadow of death..."

I shall not die says the Oak.

When the poet shuffled through the ground cover under my boughs

I gave the gift of my sound.

I shall not die says the Maple

The poet bequeathed a magic cloak on me.

I shall not die said the Sumac.

Neither shall die

Tapestry nor monument nor burning bush nor berry.

All shall live in the memories of those who read the poet.

And I shall not die

said the poet.

Because I have made a Novena.

And I have written about it.

**Loretta Petralis** was born in Rochester, N.Y., the fourth of five children. She has taught grades four through twelve, concentrating on English at the secondary level. She has also taught photography and computer courses. Loretta's favorite pastime is writing. She belongs to the Osher Lifelong Learning Institute at the Rochester Institute of Technology and resides with her husband and son in Penfield, N.Y.

## A Perfect Ripe Apple

**Don Snyder**

**W**e were all just standing around eating cookies, drinking punch. I asked Josh how Shawna was doing. It wasn't just a casual, polite question. I usually see Shawna every week here but I didn't see her last week and I was worried. I know Shawna had been diagnosed with M.S.

"She's right over there," he said. "You can ask her yourself."

And there she was in front of me. When she saw me, an immediate smile crossed her lips, and mine too, I'm sure. She looked both frail and beautiful—the more so perhaps because of her four-pronged cane.

I just love Shawna. I can't help it. She's the sweetest person. She's not fifty yet but looks much younger.

Shawna might have had her own children like the ones running around here. But she couldn't. If she could have, maybe she, too, would be chauffeuring them around for their after-school stuff instead of scheduling her next chemo appointment. She ought to be carrying around a tennis racquet instead of her special orthopedic cane.

"I'm doing okay today," she answered my unasked question, looking as open and vulnerable as a flower, "but some days aren't as good as others and then neither am I." "What about the others?" I asked. "Well, I can feel it when—what'll I call an attack is too strong a word, maybe an incident—it coming on. My left eye doesn't focus right and it really bothers me. I can't read. And my tongue—it feels too thick and I can hear a slur in my voice when I talk."

"Oh, God, Shawna, what does the doctor say?"

"He says I've got to be patient—as though I've got a lot of choice. He said this incident will pass, and it did. He's going to try another new medicine, says there's good reports about it."

I reached out for her hand and squeezed it; I thought that might say how sorry I am better than words could. She looked so unsteady. I wondered if her balance was affected by the M.S. Tears came into her eyes. She really is so beautiful.

But there we were—grownups trying to talk—kids rolling on the floor like candidates for the zoo, and I had to say something. "We all have our ups and

downs,” I said, with all the sensitivity of stale matzos. Now my eyes were getting a little blurry, too.

I felt myself slipping, I was sliding into another place. I dreamed about when you first bite into a perfect ripe apple and it tastes so good, so sweet you can't wait to bite into some more. Its flavor lingers on your tongue.

It's only a dream, I cautioned myself. Only a dream—don't let yourself get carried away. But why, why could I still taste her flavor on my tongue? Now my reverie took over for real. I wanted to hold her so tight she wouldn't hurt any more, where gravity would let go its grip so we could float above the ground and all her pain would be left far below—where her future could be as bright as the sunrise of a new day.

I wanted that bittersweet, exhilarating presence—the oneness between us to last another minute. I closed my eyes to avoid the inevitable awakening and I fell back into dreaming again.

In and out I breathed, in and out, savoring what wasn't possible in the real world. I could feel Shawna pressing against me, her eyes filling with tears, a shudder shook through her body when one of the running-around kids accidentally bumped me, flying to the cookie table. He wrecked my beautiful dream I wasn't done with.

Reality is the culprit though, not the kids. But sometimes, if you're lucky, you can hold off reality and steal a few moments for a dream that makes you glad you're alive.

**Don Snyder** earned his A.B. degree at the University of Chicago. He later attended a year-long program in printing administration at the Carnegie Institute of Technology, after which he developed a small family-operated typesetting plant into Chicago's largest typography shop. Don's recreational interests include fiction writing, black and white photography, flying, cooking, and opera. Residing with his wife in San Diego, he has two daughters and four grandchildren.

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## Brain Fitness and Lifelong Learning: A Perfect Match

**James E. Frasier**

### Abstract

*Brain health or fitness is gaining an increasing amount of attention in the national media and in lifelong learning circles. The 2006 Attitudes and Awareness of Brain Health Poll, conducted by the American Society on Aging and the MetLife Foundation, provides a backdrop of information on how Americans view brain health as a factor in their lives. This article relates results from the poll to lifelong learning organizations as a challenge for developing programs that can contribute in positive ways to participants' brain fitness. As the baby boomers begin to enter the next stage of their lives, lifelong learning programs must develop new and innovative programming if they expect to involve boomers in their programs. Boomers have been at the forefront of the physical fitness movement and are just as likely to be enthusiastic supporters of brain fitness.*

### Lifelong Learning and Brain Fitness

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**A**ctive learning that challenges our minds to work in new ways is the central process in keeping cognitively fit over the lifespan. There is, however, a troubling gap between what people do that they believe is good for their brain health and what research tells us are beneficial strategies for continuing cognitive growth and development. As a nation, we are faced with an opportunity—and an obligation—to make cognitive fitness as much a part of our everyday routines as physical fitness. To do so, we must convincingly communicate the importance of engaging in new and stimulating activities that keep our brains in tiptop shape and improve our mental performance. We need to assure that appropriate resources are available to older adults in every community. And, finally, we should establish targets for increasing participation rates across the full array of activities that keep us on our mental toes. Lifelong learning programs offer a valuable venue for a cultural shift to maintaining and improving mental fitness.

## The Neuroscience—Personal Behavior Gap

From current neuroscience research we know that participating in challenging activities leads to the formation of new brain cells and new connections among these cells, a process called neurogenesis (Cohen, 2005). Practical application of related research, as suggested by experts (e.g., Nussbaum, 2002), is to engage in new and more challenging activities or to do routine things in different ways. For example, a person who enjoys crossword puzzles might explore sudoku—logic-based puzzles, in order to “break a mental sweat.” Simply continuing to do crossword puzzles, while interesting, does become routine and over time no longer provides the benefits of new and challenging activities. The benefits for brain fitness come from engaging in activities that create new pathways in the brain (Cohen, 2005; NRTA-AARP, 2004-2005).

A recent brain health poll offers two provocative findings that will help guide future developments in community-based learning programs for older adults (ASA-MetLife Foundation, 2006). First, the poll makes it clear that although respondents do not identify brain fitness as a priority health topic, they have a good grasp of what brain fitness is, where to obtain related information, and the value of a brain fitness checkup. Second, the poll revealed that knowing brain health can be improved does not translate into behavior that maximizes the capacity of the brain to grow at any age. Together, these findings suggest that older adults lack general knowledge about how to stay cognitively fit and do not practice that which they know.

For example, poll respondents said the most common choice of activity for brain health was reading, and exercise was second. Older respondents more frequently mentioned the former, and younger people indicated the latter at a higher rate. While the generational difference is not surprising, it is noteworthy that there was minimal evidence of participation in a more diverse and balanced approach to activities that promote brain health. The poll presented a broad array of activities selected for their capacity to encourage intellectual stimulation by an expert panel in the fields of neuroscience and gerontology. These included taking a class, being in a group that discusses books or current events, volunteering, learning a new language, singing, playing a musical instrument, taking up a hobby for the first time, swimming, spending time with family, writing, limiting alcohol intake, and reducing stress. While reading and exercise, the most frequently cited brain fitness activities by poll respondents, are valuable and beneficial, they are not sufficient on their own to improve and sustain the full potential of brain fitness over the lifespan.

Scientists continue to bash many of the brain aging myths that we commonly assume to be true. A series of booklets published by The Dana Alliance for Brain Initiatives provides evidence to the contrary (NRTA-AARP, 2004–2005). For example, one common myth is that you can't change your brain. The Dana Alliance *Staying Sharp* publication states that “Your brain is constantly changing in response to your experiences and it retains this fundamental ‘plasticity’ well into old age.” A second common myth—memory decline is inevitable as we age—“is influenced by genetics, but physical exercise and challenging and intellectually stimulating mental activity, diet, social connections, how we manage stress, and how we view our world and ourselves are all important factors” (NRTA, 2004–2005; Vaillant, 2002).

Lifelong learning programs offer a valuable venue for a cultural shift to maintaining and improving mental fitness.

## Brain Fitness and Lifelong Learning: A Perfect Match

Michael Merzenich states that “to help prevent, arrest, or even reverse the effects of cognitive decline, activities must target the factors that contribute to it, as follows:

- To combat disuse, activities must engage the brain with new and demanding tasks that progressively and repeatedly challenge the brain.
- To help the brain clear up fuzzy input, activities must require careful attention and focus.
- To help increase the production of important brain chemicals, activities must include aspects that trigger neuromodulator production. Activities that are rewarding or surprising, or require focused attention, are especially good at increasing the production of these particular brain chemicals.
- To guide people out of maladaptive compensatory behaviors, activities must require people to confront challenges rather than ignore or avoid them.” (Merzenich, 2005, p. 24).

### The Lifelong Learning Approach To Brain Fitness

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A variety of lifelong learning programs that focus on the 50+ age cohort are available in the United States and internationally. Institutes for Learning in Retirement (ILRs), Osher Lifelong Learning Institutes, Next Chapter programs, Universities of the Third Age (found in Europe, Australia, China and other countries), OASIS centers, and Elderhostel are examples of successful lifelong learning programs. They are each playing a major role in the lives of individual participants who are actively engaged in activities that are directly related to brain fitness. Classes are usually noncredit, with no grades or tests, and are often peer-led. Each of these organizations provides an enriched setting for stimulating brain fitness activities. They all should leverage their resources on behalf of national initiatives to enhance the brain fitness of their constituencies in positive and proactive ways.

Many lifelong learning programs are located on college campuses, and all, regardless of their physical location, are designed to be intellectually stimulating. The campus setting allows participants the opportunity to be around younger people along with the possibility of direct interaction with the traditional-age student population. Additionally, lifelong learners may also have access to other campus facilities including libraries, fitness centers, special lectures, and even discounts at college bookstores and dining facilities. Faculty members may be utilized as resource persons and program presenters. Because lifelong learning programs are generally expected to be self-sustaining, participants typically pay membership and/or class fees. Most programs depend heavily on volunteers from their membership ranks to coordinate program components such as registration, course development, selecting staff (e.g., group leaders, class assistants, and trip leaders), create and publish newsletters, and other key operational and logistics functions.

Cognitive or brain fitness strategies may be approached subliminally or they may be introduced through an “in your face” approach, whichever works best in a particular context. The term “cognitive fitness” may be too cerebral for some groups. It may suffice to provide the programs and activities that support brain fitness without any specific reference to the concept. In other cases, participants may want to know more about the science behind brain fitness so they can understand and experience the strategies and be part of the process. It will probably require

some experimentation to find a formula that works for each organization. However, both strategies should be considered in some combination with every lifelong learning program.

### Creating and Developing a “Brain Fitness Center”

Lifelong learning centers, or “Brain Fitness Centers,” are stimulating environments for participants and staff. The Osher Lifelong Learning Institute (OLLI) at Eckerd College and the Academy of Senior Professionals at Eckerd College (ASPEC) are examples of the kinds of programs that operate in many communities across the country. One of our basic criteria when creating a class, a special event or interest group is that the activity must be intellectually stimulating. Trips are planned around an educational experience that would not generally be available to an individual. Our programming successfully fills a niche by bringing together people with disparate backgrounds and common interests to engage in a new endeavor. Together, individuals can share experiences, learn, and improve their cognitive fitness.

“Brain fitness” concepts are naturally interwoven throughout our special events, programs, and workshops at Eckerd College. We approach our OLLI and ASPEC participants, some 1,100 strong, plus our 2,800 Elderhostel guests who enroll in over 70 programs each year, on the benefits of lifelong learning and brain fitness through the practical application of basic brain fitness principles. Examples of on-going programs include peer-led interest groups and a wide variety of intellectually stimulating classes in diverse subjects. For example, adult learners can choose Homer’s *Odyssey*, tai chi or yoga, a New Visions workshop, social programs, activities supporting college faculty and students, volunteer opportunities, and more. All of the experiences are designed to be both fun and intellectually challenging. In addition, participants expand their social networks and find new meaning and purpose relevant to the current developmental stage of their lives.

We are always on the lookout for new and stimulating programs, activities, and special events that support our “brain fitness center” concept. For example, we recently piloted a Civic Engagement Workshop and have introduced a New Horizons Band to our programming. Partnerships of various forms continue to be created with community organizations such as Stetson University College of Law, the *St. Petersburg Times* newspaper, a local environmental preserve, and various media and cultural arts centers.

A lifelong learning program can contribute to improving an individual’s cognitive or brain fitness by providing:

- Multiple opportunities for *social engagement* with new people in a variety of settings (Rowe & Kahn, 1998).
- A range of new and *intellectually stimulating and enriching* activities and learning opportunities in a variety of formats both in the classroom and in the community that will challenge participants intellectually. See the Eckerd College OLLI Web site for examples: [www.eckerd.edu/olli](http://www.eckerd.edu/olli).
- Opportunities to be *engaged for the benefit of others in significant roles that make a difference* within the lifelong learning programs, in various campus programs, with faculty, and in many nonprofit and social service organizations in the community.

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## Brain Fitness and Lifelong Learning: A Perfect Match

- Opportunities to participate in *physical activities*, e.g., yoga, tai chi, kayaking, walking, biking, sailing, etc.
- A variety of peer-led interest groups and programs that stimulate *learning, reflection, exercise, planning, leading, and teaching/facilitating* ([www.eckerd.edu/aspec](http://www.eckerd.edu/aspec)).
- An *environment* that is accepting of diversity, uplifting and optimistic, stress free, and welcoming.

As we plan future programs and identify new locations, we constantly look at the above strategies and program criteria to keep our efforts on target and our outreach and development in tune with the latest research in brain fitness.

## The Challenge to Lifelong Learning Professionals

Our goal for the lifelong learning program participants at Eckerd College and in our community is to raise cognitive fitness to the same level of understanding and practice as that of physical fitness. The challenge for all of us involved in leading lifelong learning programs is to recognize and document the long-term benefits of stimulating intellectual and interpersonal brain fitness activities. We can—indeed, must—create environments that will engage our participants to strive to be more cognitively fit. To do so, we must stay informed about leading edge discoveries in neuroscience research and translate action-oriented information into the design of new programs. In essence, as lifelong learning professionals we must practice what we preach. Only by challenging our professional paradigms with new information and strategies can we create new connections that will keep our programs as fit as we want our participants to be.

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### *Additional Resources for Lifelong Learning Programs and Related Subjects:*

- AARP: [www.aarp.org/nrta](http://www.aarp.org/nrta) (See Health, Brain Health & Staying Sharp)
- The Academy of Senior Professionals at Eckerd College: [www.eckerd.edu/aspec](http://www.eckerd.edu/aspec)
- The Alzheimer's Association: [www.alz.org](http://www.alz.org) (See Maintain Your Brain)
- American Society on Aging: [www.asaging.org](http://www.asaging.org) (See Civic Engagement)
- The Bernard Osher Foundation: [www.osherfoundation.org](http://www.osherfoundation.org)
- Civic Ventures: [www.civicventures.org](http://www.civicventures.org)

Elderhostel: Adventures in Lifelong Learning: [www.elderhostel.org/ein/intro.asp](http://www.elderhostel.org/ein/intro.asp) (Includes links with Lifelong Learning Institutes in the US)

National Council on Aging: [www.ncoa.org](http://www.ncoa.org) (See Community Involvement)

OASIS: [www.oasisnet.org](http://www.oasisnet.org)

Osher Lifelong Learning Institute at Eckerd College: [www.eckerd.edu/olli](http://www.eckerd.edu/olli)

Osher Lifelong Learning Institute National Resource Center at the University of Southern Maine: [www.usm.maine.edu/olli/national](http://www.usm.maine.edu/olli/national)

University of the Third Age, The Third Age Trust: [www.u3a.org.uk](http://www.u3a.org.uk)

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Our goal for the lifelong learning program participants at Eckerd College and in our community, is to raise cognitive fitness to the same level of understanding and practice as that of physical fitness.

## Pentimento Project: Celebrating the Power of Lifestory Writing and Sharing Groups

**Michelle Sierpina**

### Abstract

*This article introduces The Pentimento Project, a series of lifestory writing and sharing group protocols, while previewing recent research findings on those groups. Six formats for lifestory writing and sharing groups have evolved at the University of Texas Medical Branch in Galveston. Participants remain in the groups for long periods of time, often years. To understand why, recent research investigated to what extent participation in these groups enriches the lives of elders. Findings were analyzed based on Robert Atkinson's four functions of story. Here the author shares findings related to one of those—the social function of story.*

### Introduction

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“I want to write down my stories to share with my children and my grandchildren. I've had an adventuresome life and by telling them my stories I want to add flesh to my bones” (Sierpina & Cole, 2004). Those words articulate one woman's reason for joining a lifestory writing and sharing group at OLLI at University of Texas Medical Branch in Galveston (UTMB). She wrote those words in response to the question, “Who am I and why am I here?” It is the first question posed in the first few minutes of the first session of the Introductory Lifestory Group. From that moment forward, participants write and share their stories with one another, creating a collection of lifestory vignettes, while forming community.

Begun in the mid-1990s by Dr. Thomas R. Cole and a graduate student of his, Kate de Medeiros, lifestory groups evolved from a small scale research project into a powerful experience for hundreds of group participants over the past decade. Dr. Robert Atkinson cited this as an example of a national trend. “When the *New York Times* reported, in a full page article on February 9, 2000, that ‘thousands’ 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” wrote Atkinson (2006, p. 88). The article profiled one lifestory writing and sharing group in Galveston, Texas, begun by Cole and de Medeiros. Shortly after the article appeared in the *Times*, a reporter and film crew from ABC News flew to Galveston

to interview participants and members of a similar group in Houston, which was part of the Galveston group then, and is part of OLLI at UTMB today. This article describes how those early beginnings grew to become the *Pentimento Project*. Since 2003, sometimes as many as five lifestory writing groups have been offered in any semester, facilitated by two, three, or even four facilitators.

In the 1940s, Allport (1942) recognized the use of personal narrative in therapy. Beginning with Butler's (1963) landmark work on life review in the aged, a focus on aging grew. A decade later, Butler (1974) himself reviewed the value of reminiscence in successful aging. After another decade, Rico (1983, 2000), Goldberg (1986), Kaminsky (1984), Pennebaker (1986), and others were publishing on the power of personal reminiscence and self-expression through writing. Denzin's (1989) small but important book introduced the concept of "interpretive biography."

Thorsheim and Roberts (1992) presented protocols for lifestory sharing. Others, to name only a few, such as Birren and Deutchman (1991), Haight and Webster (1995), Garland and Bornat (1994), and Manheimer (1999) offered their own versions of lifestory with elders. Work by Myerhoff (1992), Haight and Hendrix (1995), Cohler and Cole (1996), Smyth et. al. (1999), Pennebaker (1999), and Cole (2001) expanded the arena. Cohen (2000; 2005) introduced creativity in aging to professionals and the lay audience, especially highlighting the value of lifestory. Cohen (2005) cites the "autobiographical urge" in late life (p. 77). Research by Mastel-Smith (2004) opened a new door on lifestory protocols by studying the introductory *Pentimento Project* lifestory group protocol.

Research was undertaken at UTMB in 2006 which, perhaps for the first time, involved interviewing participants themselves, thereby capturing their experiences in their own authentic voices, rather than filtered through the perceptions or observations of others. Findings from this phenomenological study were analyzed using Atkinson's (1995) four functions of story: 1) psychological, 2) social, 3) mystical, and 4) cosmological (Sierpina 2007). This article will include preliminary findings related only to the social function of story.

### Pentimento Project Protocols Defined

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As Kenyon and Randall explain, "By bringing life into interface with story—as we do when we entertain the book's central concept lifestory (two words we treat as one, like history)—we are being doubly interdisciplinary" (Kenyon and Randall, 1997, p. viii). In the *Pentimento Project*, lifestory is one word.

It was Norman Denzin (1989) from whom the idea of *pentimento* first came to this researcher's attention:

Stories then like the lives they tell about, are always open-ended, inconclusive and ambiguous, subject to multiple interpretations. The elusive nature of these stories calls the person back to the understanding that this business of a life story is just that, a story that can never be completed (p. 81).

*The American Heritage Dictionary Online* provided a fairly typical definition emphasizing the transparency achieved by looking back from the vantage point of

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age ([www.bartleby.com/61/37/P0173700.html](http://www.bartleby.com/61/37/P0173700.html)). “An underlying image in a painting, as an earlier painting, part of a painting, or original draft, that shows through, usually when the top layer of paint has become transparent with age.” Taken together, UTMB’s lifestory protocols engage participants in looking back at life through the new perspective to see possible underlying themes, which might have become covered over during the process of living a full life.

What is the *Pentimento Project*? Like many others, UTMB’s protocols involve weekly meetings that last two hours. As part of the OLLI semester, the meetings last for eight weeks. Core principles and shared characteristics of these protocols include:

- Groups meet for eight weeks in two-hour sessions each week under the guidance of a facilitator trained in the particular protocol.
- Facilitator does not participate in writing and sharing his or her stories.
- No less than 12 and no more than 16 participate in each group.
- Each person reads a story each week of about five minutes in length while other members of the group listen attentively and with intention.
- Group members and facilitator comment on shared stories, identifying first “what worked” and, possibly, “what might have been added.”
- Confidentiality is honored; participants sign a pledge of confidentiality.
- One voice is heard; one person speaks at a time, with no “cross talk” and no interruptions.
- Comments are about the writing, not about the writer or the writer’s feelings.
- Feedback is framed in a positive rather than critical manner.
- Grammar, punctuation, syntax, and spelling are not discussed—writing improves through the practice and through observing effective techniques in shared stories.

*Pentimento Project* protocols engage the participants in writing and sharing stories. Most group participants continue to enroll in lifestory groups semester after semester, so a variety of protocols, shown in the chart below, evolved to meet their expectations. Previously published work delineates objectives, procedures, course handouts, confidentiality forms, and bibliography for basic lifestory groups. Those are available as a training manual (Sierpina, 2002) and a facilitator training video (Sierpina & Cole 2004).

### *Pentimento Project* Lifestory Writing and Sharing Group Formats

Share Your Life Story	Original format from which others described here were derived
Introductory Lifestory	Basic introduction required for participation in other groups
Meaning among the Memories	Follows introductory course; offers additional writing triggers
Lifestories as Legacy	Story suggestions or writing triggers reflect life’s decades
That’s Another Story	Experienced participants use previous stories for new topics
Advanced Lifestory	Seasoned participants share longer, more complex stories

The lifestory groups provide participants with a safe and comfortable environment for writing and sharing stories with their contemporaries. Through that process of *pentimento*, elders are offered the opportunity to change their minds about any old conceptions or perceptions that might have clouded the spirit. These

groups allow participants to revisit their lives from a new, creative perspective. These workshop formats facilitate a re-visioning, as things “clouded over” became transparent. Through these various lifestory group modalities, elders can make a conscious choice in their late years to revision their lives. Atkinson (1995) says this, “A story told well carries a power that can pull blinders off our eyes... teach us something important about life that we had probably forgotten that we knew” (p. 5).

### Similarities and Differences

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Lifestory writing and sharing groups come in many forms. Birren and Svensson (2006) described their Guided Autobiography (GAB) Method succinctly: “Guided by a trained instructor, participants are led through ten sessions of two hours or more in length, meeting once a week” (p. 114). Most such activities for elders have something of this basic structure. In place for three decades or more, the GAB remains a pioneering, enduring success. It includes priming memories, shared themes, and group process (p. 113).

“When topics are discussed in a group, the memories of other group members are stimulated and they begin to remember events long forgotten,” note Birren and Svensson (p. 115). In *Pentimento* Project groups, each participant reads a 5-minute lifestory vignette each week. In the notebook where stories are kept, group members keep an easily identifiable colored sheet upon which they are encouraged to jot notes about memories that emerge in stories of their peers. Rather than discussing the stories, attentive listening stimulates story ideas, which often inspire numerous stories within the group.

In keeping with respect for participants, sessions begin and end on time, lasting just two hours. Allowing for each participant to read each week, there is not time for discussion, although group members do give positive feedback on the work of others.

In the introductory groups, writers are encouraged to experiment with a variety of writing styles: narrative, first person, third person, letter writing, self-reflective writing (journaling), even simple poetry. There are never “assignments,” just suggestions. Few writing themes are provided and when they are presented, they are only ideas, not required assignments. Later groups do offer weekly writing triggers, but those, too, are only suggestions. Writers are encouraged to write whatever surfaces for them. It may emerge from a story they hear in the group or from any life experience. Sometimes new stories are embedded within the writer’s own story for the week. This happens often when someone says, “But that’s another story!”

### Social Function of the Lifestory Groups

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The UTMB study examined the lived experience of lifestory writing-and-sharing group participants. It elicited participants’ self-reporting of how the groups provided meaning, purpose, new insight, or self-reflection to their lives. Their responses were examined using, primarily, four functions of stories based on the theories of Atkinson (1995). These four functions are: 1) psychological, 2) social, 3) mystical, and 4) cosmological. Focus here will be only on social function of story.

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According to Atkinson (1995), lifestory sharing can establish bonds and form community:

Life storytelling is an act of affirming and validating our own experience in relation to those around us. Sharing our story with others helps us understand our commonalities with others and therefore feel more connected to others. The bond established in this exchange helps us maintain a sense of community and to understand the established order around us as we become more aware of the range of possible roles and standards that exist within the human community (p. 9).

Function	Atkinson's Definition	Examples aligning findings with Atkinson's Theory
Social Function	Stories with a social function... show commonalities and connectedness to others	Social function appeared in two ways. Sociability among group participants was reported by every co-researcher. Social function was demonstrated by sharing the stories with other cultures and generations within and outside the group.

Bonds form, relationships are forged. One person described it this way: "People, who at the beginning are relative strangers, now the same people have been in classes for two or three years and we're not strangers any more." Davis (1995) documents these occurrences in reporting on writing groups: "We have also seen, as an AARP Reminiscence volunteer noted, 'Reminiscence helps people build bridges of understanding across generations and between cultures. In reminiscing together, people who might otherwise be strangers see and enjoy their common humanity' " (p. 271).

In practice, participants do not stay together in one group. Writing groups are scheduled within the OLLI curriculum, so group composition changes from semester to semester. Lifestory groups are open to all, regardless of any previous life circumstance. As a result, diverse groups form because participants generally select a group based on whether the meeting time fits into their schedule rather than on the makeup of the group members. This random process ensures group diversity.

People learn about other cultural experiences through one another's stories. They discover many similarities, thereby fostering understanding and compassion for one another. They also learn how cultural experiences help to shape each person and they come to honor the differences as they understand others' lives more fully.

One co-researcher in the study described a person in one of the groups as "being about as far away from me as one can probably get," but they have become acquainted on a deeper level through the story groups. These two individuals are far beyond the bounds of immediate ties, but the respondent expresses deep respect:

I think of him as different from me, and yet I admire him so much, respect him so much. He's got a lot on the ball and he's got a great heart. If I never met him—and I probably would never have met him or never

had gotten to know him—and I don't know that I would have even liked him, because he's so far in the other direction.

Sharing stories through open-hearted, attentive, non-judgmental listening bridged social and cultural barriers for both.

This finding has implications in numerous contexts for today's aging population as individuals enter new, unfamiliar living situations. When people move from familiar settings to new residential communities or congregant living, building new relationships can be difficult, seemingly impossible. Sitting together at meals or in organized activities may not provide the opportunity for understanding one another as unique and interesting individuals. As one respondent noted, in social settings people seldom have time or take time to listen at depth to one another. Co-researchers report that the lifestory groups open a space for safe sharing, attentive, non-judgmental listening, and, ultimately, for getting to know, and forming bonds with, those who represent the unfamiliar at the outset. In the lifestory groups, even newcomers to existing groups were welcomed with openness.

Participants form community within the lifestory groups. "There's a connection, conversations, friendships form," reports one co-researcher. Atkinson (1995) sees "a sense of community" which connects people, establishes a bond (p. 9). People in the groups were engaged in other "communities" and led active lives. One, at 90, sometimes got so busy with social events and activities, there was insufficient time left for writing.

Why, then, do they need to find and form bonds in a new community of lifestory writers? Implications from the data suggest that the groups offer unique elements not found in other community groups. Trust, confidentiality, respectful, attentive listening, and non-judgmental appraisals of the stories offer social fulfillment the writers fail to experience in the myriad other social settings in which they find themselves.

One respondent described the sense of community in the groups, "Atmosphere of the classes was warm and friendly and what I would call 'community.'" The comment came from the experience of one who has played a lifelong role in building and creating "community" in both the U.S. and abroad. The structure of the lifestory group protocols and the leadership of the facilitators created that sense of community for this person. Atkinson (1995) notes, "Sharing our story with others helps us understand our commonalities with others and therefore feel more connected to others. The bond established in this exchange helps us maintain a sense of community..." (p. 9). He is not describing the group setting examined by this study. However, his insight strikes, like a lightning bolt, precisely at the social experience the groups provide for participants.

Those who live alone and far from support networks obviously benefit from the intentional listening they experience when they present their stories to the groups. Co-researchers who live with a spouse or other family members also report that sharing stories in the group has value. Some of them reported that such sharing provides a deeper, richer quality than sharing with loved ones. One co-researcher, who is married and has many grown children and friends who listen to his stories, said this:

Lifestory groups are open to all, regardless of any previous life circumstance. As a result, diverse groups form because participants generally select a group based on whether the meeting time fits into their schedule rather than on the makeup of the group members. This random process ensures group diversity.



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I always had my wife to listen to stories that I had written or wanted to tell. But the group came ready and prepared to hear whatever story I wrote. I was doing the same thing for them and that was very creative, very helpful. It certainly encouraged the writer because you always knew that you were going to have somebody to read it to. That is a much more helpful vehicle than trying to sit down and read alone or read it to family and friends.

The *pentimento* effect lets participants see their early life experiences from a new perspective. In the same way, sharing stories in a trusting group context helped everyone see new things (or see things anew) to appreciate about the others once they came to understand them more.

Friendships outside the group are enriched, too, by the story sharing. Once the stories are written down, they are often shared with families, friends, faith communities, clubs, civic organizations, and others. One recounted sharing the stories with an equestrian club, another shared stories with a gardening group, another with a senior group at church and a theater group, and everyone reported sharing stories with some family members whether spouses, siblings, children, grandchildren, and others.

Individuals in the study reported feeling validated and affirmed. This illustrates what Atkinson (1995) sees as an element of the social function of story. Co-researchers credited the group setting and core principles with creating an accepting atmosphere of “kindness” and attentiveness. One mentioned that group members laughed appropriately at humorous story content. Another used the example of lifestory group members taking time to listen and validate the reader in a world where others are so often impatient. Implications here are potentially far-reaching and worthy of further study.

One person mentioned examples of typical social functions—cocktail parties or holiday dinners—as unwelcoming to “stories” of any complexity. Interruptions, distractions, and logistics preclude listening to stories of any significance or depth. Co-researchers noted that the lifestory groups allowed for deeper listening, which moved the interactions to a more substantial connection. Those who are no longer engaged in a workplace setting, educational environment, or other previously meaningful social contexts may benefit from this opportunity to connect socially at a meaningful level. Further study on this point is appropriate.

Not only did the lifestory group participants appreciate being listened to, they took pride in developing new listening skills themselves. Everyone reported they learned to listen attentively. There are obvious social implications, not the least of which is being appreciated by others for that unique and uncommon practice of deep, attentive, sincere listening. Further, though, one co-researcher articulated the added richness deep listening skills gave to ordinary life experiences. Better listening skills helped her practice more detailed writing of one’s own stories and led, ultimately, to more richness in everyday life experiences.

## Lived Experience of Lifestory Group Participants

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One group member, who has participated in several groups said, “This format affords me a wonderful opportunity to explore things long forgotten—and to have fun doing it” (Sierpina & Cole, 2004). On the same video, another said, “I want my children and grandchildren to know who I am and to know a bit about their own history.”

One gave this appraisal: “I miss people who have been in classes and who I don’t see, whose stories I enjoyed. I feel like I know all of them much better than if I had just met them at a cocktail party [or in a class on Shakespeare].” The groups set the tone for a closer social connection between people.

For most co-researchers, defining or establishing their role within the human community meant leaving the stories as a legacy to future generations. Among the most common comments:

- My grandchildren love to have me read to them.
- My children will enjoy that one.
- Each of my children will get a copy of the stories.
- I gave the children copies of the stories.
- I wanted to put down in words my life so my children and grandchildren and great grandchildren would know what it was like back in the ’20s.
- We’ve been absolutely astounded at the joy our grandchildren have in it.

## Summary

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If one were to perform a cost-benefit analysis of the typical lifestory group for elders, the results would be extremely positive. In many cases such groups can be nearly cost-free, if free meeting space and a trained volunteer facilitator are available. In the community where the study was conducted, a local library and several other venues allow nonprofit groups to use facilities for no charge. With a trained volunteer facilitator conducting the groups, there is little additional cost. Each participant can bring a notebook for personal use for organizing materials. The first week there are several handouts for each participant, but after that there is a single page handout each week. With today’s technology, those can be printed at a minimal cost. In fact, although it has not been done in any groups studied, the handout could be made available electronically for participants to copy themselves, further reducing cost. Training materials and even electronic templates for all course materials are available for use (Sierpina, 2001, Sierpina and Cole 2004). Once the facilitator is trained, the materials can be used repeatedly.

Other findings from this study incorporate Atkinson’s other functions of story as they relate to lifestory group participant. In a world where human contact and personal interaction is diminishing, where ageism exists in both subtle and not so subtle ways, additional findings from the study data suggest that effective lifestory group interventions can provide recognition for group participants; enhance spiritual growth, increase intercultural awareness and understanding among groups of diverse individuals. Study findings suggest that this simple process of writing and sharing personal lifestories in groups can improve memory, enhance self-esteem, and reduce depression among other positive benefits.

In a review of literature over two decades ago, Molinari and Reichlin (1985)

Co-researchers credited the group setting and core principles with creating an accepting atmosphere of “kindness” and attentiveness. One mentioned that group members laughed appropriately at humorous story content. Another used the example of lifestory group members taking time to listen and validate the reader in a world where others are so often impatient.

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offered assumptions, some of which are supported by the current study:

- life review has an evaluative component
- reminiscence has interpersonal and intrapersonal aspects
- life review “involves positive affect and outcome”
- beneficial effects are suggested; more research is needed
- “viewing reminiscence as a form of action may provide concepts that can be operationalized and tested” (p. 89)

Those who practice lifestory, reminiscence, and life review work can offer and answer questions through further research and scholarship-based praxis. This cost-effective activity for elders offers powerful health, social, spiritual, and psychological benefits for all generations. Viewing reminiscence [within lifestory groups] as a form of “action” may make it possible for implementing lifestory groups to an ever wider audience as the population ages. The research reported here grew from that goal.

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## Research Abstract

## A Construction of Twelve Lifelong Learners' Perspectives: An In-Depth, Naturalistic Study of Self-Integration of Learning

**Marvin L. Hunt**

I completed my dissertation on lifelong learning at the University of Nebraska-Lincoln in November 2006. As director of the University of Kansas Osher Lifelong Learning Institute, I have been deeply involved with all aspects of lifelong learning. Thus, a dissertation focused on lifelong learning only seemed natural. My research focused on understanding people who have chosen to learn throughout their lives. A broad question guided this research: What is the rich, lived, lifelong learning experience from the individual's perspective? This question allowed each participant ample freedom to explore and define issues he/she considered important relative to lifelong learning.

Twelve lifelong learners from a wide range of backgrounds, ages, and experience were serially selected using maximum variation sampling. Most qualitative research uses *a priori* questions aimed at a specific topic, limiting participants' discussion. In this study, however, grand tour questions prompted each participant to offer information about lifelong learning experiences. In-depth interviews revealed 16 thought categories including integration of life and learning, learning process, role, influences, major life changes, benefits, favorite topics, issues, view of self, and motivation to learn.

This naturalistic and constructivist research allowed each participant freedom to explore topics during several interviews which were documented by audio recordings and handwritten notes. Member checks (asking the participant if what I wrote or thought she/he meant is actually what the participant intended) during interviews assured the written description matched each participant's perspective. A grand member check brought participants together to suggest edits and finalize approval of their perspectives, as written in the study.

Three outcomes resulted. First and most important, the study compiled 12 learners' unique and verified perspectives through participant profiles and a case study narrative. Second, despite sharing common traits with other learners, each learner integrated lifelong learning in a unique way. Organic descriptors were developed to illustrate each learner's self-integration traits. Those descriptors included seeker, academic entrepreneur, new individualist, pragmatist, holistic thinker, cre-

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ative compromiser, nonconforming introvert, detailed internationalist, restless idealist, academic learner, community leader, and involved mentor.

Other learning research has used generic descriptors that apply to large groups of individuals. For example, Gardner's (1983) well-known research indicated qualities of individual competence through multiple intelligences including verbal-linguistic, logical-mathematical, or musical-rhythmic intelligences. Gregorc (1982) discussed four learning styles including concrete-sequential, concrete-random, abstract-sequential, and abstract-random. Gardner's and Gregorc's categories help us consider schemes for understanding universal traits.

Although this study identifies the possibility of common approaches to learning between one learner and the next in some instances, it does not propose that commonness exists among all learners, even across four broad learning styles as does Gregorc's system. Instead, this study revealed 12 learners' unique and individualized learning approaches as suggested by the descriptors. Systematized learning approaches and categories help us envision how people might generally learn or behave, but each individual's complexity and uniqueness as a learner dominated this research and characterized the second outcome.

Third, a theory grounded in the lifelong learners' common and uncommon traits was developed. The Inside-Outside Theory of Lifelong Learning Integration posits that, while there are similarities in learning processes and preferences among the study's learners (i.e., inside traits), there are also differences distinguishing learning processes and preferences for each learner (i.e., outside traits). This study-specific theory helped facilitate recognizing inside and outside traits among any and all of the learners. Lifelong learning professionals must become familiar with their membership's learning needs and determine how or if this study-specific theory may apply to their local situation.

I would like to thank my advisor, James O'Hanlon, emeritus dean and professor, University of Nebraska-Lincoln, for his outstanding help with my dissertation.

To access the complete dissertation free of charge, go to <http://digitalcommons.unl.edu/cehsdiss/5/>.

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Research Abstract

## Participation in Lifelong Learning Institutes: What Turns Members On?

**Rick Lamb and E. Michael Brady**

Data for this study were collected in the spring of 2004 from the Osher Lifelong Learning Institute at the University of Southern Maine. Forty-five experienced members of OLLI were interviewed by way of six focus groups. The sample consisted of “rank and file” students (e.g., not being on the board of directors, program faculty, or having another leadership role in the organization) who had taken courses for six consecutive semesters. The purpose of the research was to learn what benefits are derived from long-term participation at OLLI. In other words, what turns members on?

The first theme that emerged from the data was that OLLI provided *intellectual* stimulation. People talked about the joy they experience when they learn new things. In many courses older learners were asked to “stretch” their intellects in ways that proved to be both challenging and deeply satisfying. One man described his overall experience as “an aphrodisiac of the mind.”

A second theme was the experience of a *supportive community*. Members described how the openness, honesty, and sense of trust, which are regular aspects of the OLLI experience, serve as a foundation for many of the other benefits that derive from participation. An especially salient dimension of this community was the mutuality of learning that occurs between teachers and students.

Thirdly, members developed greater *self-esteem*. Learners felt that they had become more knowledgeable and interesting. This finding was especially compelling for women. A number of older women shared stories about how, earlier in their lives, they had been intimidated or ignored in school. They have discovered a voice at OLLI. Participation in the lifelong learning institute has also changed peoples’ views about aging itself. One participant expressed her feelings this way: “I feel validated for who I am.”

The fourth and final overall finding related to *spiritual renewal*. Due to both the curriculum at the University of Southern Maine’s OLLI (which focuses, in part, on religious and spiritual themes) and the overall experience of community, members described how they were “filling a need” as searchers or pilgrims. Learners talked about having been introduced to new religious ideas and doctrines in a non-threatening manner that did not attempt to evangelize. They grew beyond their



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own formal religious education and expanded their tolerance for other belief systems. The quality of discourse on spiritual ideas “was a very rare thing” and took place on a regular basis “because you trust people.”

*Note:* A research article based on this research has been published. See Lamb, R. and Brady, E.M. (2005), Participation in Lifelong Learning Institutes: What turns members on?, *Educational Gerontology*, 31(3), 207–224. This article may also be read in its entirety by going to the OLLI National Resource Center’s Web site—[www.osher.net](http://www.osher.net)—and clicking on “research.”

**Rick Lamb**, a retired social worker, earned his M.S.W. at Columbia University and a Certificate of Advanced Study in Adult Learning at the University of Southern Maine. He is an active member of USM’s OLLI and serves as associate editor of *The LLI Review*.

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

## Studies on Aging for the Older Adult

**Rhoda Wald**

### Abstract

*This paper presents the background, ideas, and issues emanating from a series of programmatic directions and study groups on aging studies for an older adult population. The topic is analyzed in the context of recent trends in higher and continuing education for the older adult. The Harvard Institute for Learning in Retirement, connected to Harvard's Division of Continuing Education, represents this trend. The essay begins with a description of the concept, the constituency, and the setting. The article continues with examples of the programmatic developments at this Institute through a series of conversations about aging. Issues for further research and development conclude the article.*

### Introduction

*"It has been too much the custom to think of education as an affair of youth, and even of the earlier years of youth; but it really should be the work of the whole of life."*

—Charles W. Eliot, President, Harvard University, 1869–1909

The purpose of this article is to articulate a series of ideas regarding lifelong learning and curriculum design for the older adult. The roots of my approach are derived from a basic philosophy about lifelong education: that each stage of life has its own possibilities and transitions; and that learning and renewal involve intellectual as well as personal dimensions throughout the life cycle. Although there are many programs for older adults, courses and other learning activities related to the issues and transitions of the later stages are generally not available.

Strategies for integrating aging studies can help us find answers to the following questions: How can we define this stage of life? What are the commonalities, what are the individual differences? What is inevitable? How can an individual cope with transitions? What are the personal and societal moral imperatives? What are the existential dilemmas? Finally, how can we help people perceive the range of realistic possibilities and, at the same time, transcend the clichés, myths, and stereotypes about this stage of life?

## Studies on Aging for the Older Adult

At Empire State College, the nontraditional unit of the State University of New York, I taught various topics related to adult development to an adult student population (the average age was 36). In individualized and small seminar modes I taught courses on the adult experience, issues in aging, moral development, life cycle theory, and death and dying. Student responses were overwhelmingly positive; students reported that these courses were stimulating, provocative, and meaningful and provided serious applications to their personal and professional lives. The satisfaction I received from teaching these courses exceeded my expectations. The students were open, reflective, and scholarly.

In 2000, I taught a course, "Life and Death, Affirmation and Meaning," at the Osher Lifelong Learning Institute at Brandeis University. Although I had taught this course at Empire State College, I had some apprehension about teaching this subject to a population of people in their sixties and seventies, a group for whom the topics were timely but, perhaps, painful. This experience also turned out to be positive for me and for the participants. The participants welcomed the opportunity to explore various theories related to life and death from a cross-cultural perspective that had relevance for their lives. Exploring loss and crisis was life-affirming and beneficial.

This experience was the impetus for me to think about how, when, and where these subjects could be taught on a wider basis to older adults who were actually facing these issues. The impact of studying theories relevant to their current experience which explored issues and directions for personal growth, change, and meaning was intriguing but also complex. As an older retired adult, this development mirrored my own experiences and consciousness, questions, and unresolved issues.

In this article, a beginning strategy addressing this concern is offered. The background and setting are presented in the next sections followed by an analysis of current activities. Ideas for future directions conclude the discussion.

### The Background

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Significant changes in life style patterns of the older adult after retirement are gaining widespread attention. Theorists and practitioners focusing on this population are evolving new ideas about this stage of life.

Previous theories about aging have included the concept of decline or loss, the myth of the American dream relating to leisure and recreation, and life cycle theory (Erikson, 1975, p. 247–274).

Each of these concepts has a place in a holistic depiction of the later stages of life. However, collectively or individually, they do not tell the whole story. As we move into unprecedented demographic changes in the United States, more and more people 65 and over are not only living longer, but living healthier, vital lives with a thirst for intellectual stimulation. Often these individuals are seeking new models and settings for learning.

Many people are responding to these interests through memberships in lifelong learning institutes. The Harvard Institute for Learning in Retirement (HILR), an arm of Harvard University's Division of Continuing Education, is an example of one of these settings. For purposes of this article HILR illustrates an intellectual setting for analyzing curriculum and program development regarding studies in aging for people in their sixties, seventies, and older.

## The Setting

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The Harvard Institute for Learning in Retirement, one of the pioneering educational experiments for older adults, opened in 1977. The model is an impressive example of peer learning and teaching. Presently, there are approximately 500 members. Many of the members lead study groups as well as participate in them. During the fall semester 2006, there were 65 study groups led by members either individually or in teams of two. The educational model is a seminar format within a broad range of topics representing the range of disciplines and interdisciplinary topics that can be found on any liberal arts college campus. In addition to the study groups, there are extra-curricular offerings by scholars outside the Institute and informal poetry, memoir writing, and philosophy dialogue groups led by members.

Administration consists of a paid director and assistant. There is an elected council of members to make policy decisions. Members participate in a range of committees related to policy, administration, admissions, technology, finance, teaching and learning, curriculum, and long-range planning. There is an admission process and usually there are more candidates than openings, illustrating the interest of the older adult in continued learning.

The curriculum is rich, vigorous, and varied. Literature, history, and contemporary societal issues are particularly in great demand. Some members lead study groups in the areas in which they had professional expertise. Others prefer new areas of personal interest. For example, a physician might be teaching medical ethics, philosophy of Islam, or the oil crisis. Most study group leaders do not choose to lead the same study group more than once or twice, illustrating again their thirst for new adventures in learning.

However, study groups on aging have not been common. There has been a conscious reticence about courses and discussions on aging. The general attitude was that people were not interested in these topics. Recently that concept has changed dramatically at HILR. The remainder of this article presents the process that led to the change with its implications for curriculum and other programmatic directions and areas for future study.

## How We Began: Conversations about Aging

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In the spring of 2005, Hyman Kempler, a colleague at HILR, and I co-led a study group, "The Aging Challenge: A Multidisciplinary Colloquium." The goal was to explore positive images of getting older and various sessions focused on life cycle theory, cognition, philosophy, literature, and spirituality. We also presented a lecture, "The Aging Challenge," for the entire membership.

A sample of the responses to these activities from both the study group and the lecture provide a portrait of the relevance of these themes. "It is satisfying to be surrounded by people who are aging well." "It is validating to know that other people are struggling with the same issues." "Looking back at my own life cycle in the context of a theory gave me a sense of where I had placed my priorities and what I want to do with the rest of my life. Facing the past and the present makes each more fulfilling." "I have changed my self-image." And finally, "I was not really aware how ageism is portrayed in the various media."

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## Studies on Aging for the Older Adult

One of the original planners of this study group was our colleague, Robert Stein. He became ill before the course began and wrote to the two of us, "I'm trying to imagine what the aging challenge is for me. Clearly dealing with limited life and having a notion of what I'd like to achieve, still, leaving some kind of legacy and trying to move on. I have to accept realities regarding memory, energy, and resilience. And I still have attachment to the idea of a soul and faith." (Bob Stein died in September 2005 of cancer.)

These comments still resonate with me. They are a powerful commentary about this stage of life and, in the context of lifelong learning, urge us to think about educational strategies for exploring these issues. What does aging well mean in today's world? What does it mean for retired people in their 60s, 70s and older who are facing the expected issues of this stage of life? Should we think about these questions at HILR and, if so, how? Are these crucial questions for all lifelong learning institutes? What are the possible strategies for exploring them?

In the fall of 2005, the curriculum committee at HILR initiated a series of open discussions for the entire membership regarding the various disciplines that constitute the HILR curriculum. These meetings were designed to (a) enable all members to provide ideas regarding future groups, and (b) encourage both new and experienced study group leaders to develop programs in the context of long-range planning. We expanded the dialogue groups to include Studies on Aging.

Our goal was to initiate a conversation about aging that might suggest directions to pursue and eventually pose questions about the role of the older adult in the 21st century. The ideas that surfaced during that meeting were: traditional and nontraditional views of wisdom, elderhood as expressed in the arts and literature, social class and economic issues, ethnic and gender differences, the biology of aging, theories about aging, humor and optimism, and issues of aging— isolation, illness, and successful aging.

The response was enthusiastic and open and the people who attended requested we meet on a regular basis. Since that time the Studies on Aging group has moved in several directions, without any preconceived ideas about where and how the next steps would be. At subsequent meetings, four subgroups were formed which met several times during the spring semester and summer: 1) Roundtable: Exploring Aging through Literature and Film, 2) Roundtable: Aging Minds, 3) Roundtable: Self-study through Personal Narratives, 4) Roundtable: Political Action and Advocacy. Each of these roundtables was facilitated by a coordinator.

Some questions which emerged from these groups related to issues about learning for the entire life cycle. There are no data regarding learning styles of this age group. What can we learn about senior learning in general? There are no monetary rewards, no tenure, just the satisfaction of doing it. What stimulates and motivates the older adult to continue learning and teaching? What keeps us so involved at this stage of life?

Leadership of the studies in aging was an evolving process as well. I took on the coordination for the group and we now have a mailing list of about fifty members. The substance is rich and complex but the structure is ambiguous because it did not fit into the current curriculum model. Although there were members who were, and still are, wary about this development, the administration and standing committees were supportive.

## Implications for Curriculum

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In designing both formal and informal activities around studies on aging, several important issues are apparent. The first is the socialization of culture and strategies for educating people to explore concepts that lead to dignity, respect, and positive self-image (Gullette, 2004). A second concern is one of meaning. There is a mystery to this stage of life. The activities we envision should be geared to counteracting skepticism and depersonalization and nurturing imagination. Third, the challenge is to design study groups that lead to intellectual paradigms for thinking about attitudes, values, self-image, cultural issues and discrimination (Gilleard & Higgs, 2000). Finally, death, sickness and pain cannot be ignored; they are on everyone's minds.

Examples of future study groups we have discussed are:

- *History*. How has the concept of aging changed in our society and how does the past inform the present and the future?
- *Social Sciences*. What are the economic, sociological, and political issues?
- *Literature*. How can literature add clarification for this stage of life through development of character and negating of stereotypes?
- *Science and Psychology*. What is biological and what is psychological? What disciplinary perspectives help clarify perspectives and provide quality and meaning?
- *Cross Cultural Studies*. What are the ethnic, religious, and national differences?

The challenge is to perceive life as a continuous journey of change at all stages of life rather than compartmentalized separate age categories. There is a strong mandate to respond to longevity with satisfying learning and work potentials. As with any self-selected program, there are many people who are not interested, but there are many who embrace the idea.

## Conclusions and Further Research

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Our experience this year suggests some interesting and intriguing directions. A strong voice regarding aging studies now exists at HILR. A substantial proportion of older adults are hungry for creative settings to discuss the intellectual and personal dimensions of this stage of life. At HILR we have been going forward as grass roots interests have emerged and are presently exploring new study groups in this area. The special interest roundtables will continue and our expectations are that these groups will present their strategies and findings to the entire membership though informal bag lunches, lectures, and/or forums. Several of them might lead to concepts for study groups. Our basic goal is to maintain conversations about aging in a variety of contexts to provide choices for our membership.

The impetus for further development in this area is based on several ideas that need to be emphasized and reinforced by all segments of society including educational, political, and social policy resources. First, the demographic trends indicate that the older adult will comprise a larger and larger proportion of the American population. The population 65 and over will increase from 35 million in 2000 to 40 million in 2010 (a 15% increase) and then to 55 million in 2020 (a 36% increase for that decade). In 2005, 12.4% of the population was 65; by the year 2015 that number will increase to 19% (U.S. Dept. of Health and Human Services, 2005).

What does aging well mean in today's world? What does it mean for retired people in their 60s, 70s and older who are facing the expected issues of this stage of life?

## Studies on Aging for the Older Adult

Second, the LLI's across the country have the population and resources to further investigate important dimensions of lifelong learning. Third, the issues should not be avoided any longer. People are thirsty for settings to explore these issues. Fourth, these ideas need to be viewed in relation to our culture, how our culture limits or strengthens the meaning and satisfactions of this stage of life.

Evidence from recent research studies indicate that higher levels of education correlate with the maintenance of cognitive and emotional functions (Cohen, 2005; Goldberg, 2005). Future studies might examine the results of continued learning on these capacities and strategies for reinforcing these possibilities among all social groups and levels of education. In the context of learning for older adults and new models of education for people after retirement, research regarding how people examine the issues and meaning of this life stage is almost uncharted territory. The central issue is to begin.

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**Rhoda Wald** is professor emerita at Empire State College, SUNY, which pioneered innovation education for adults. In both administrative and faculty roles she brought her expertise in adult development to settings in the United States and abroad (e.g., India, Cyprus, Israel). Her doctoral degree is from Teachers College, Columbia University. At the Harvard Institute for Learning in Retirement she co-chaired the Studies in Aging Committee and led study groups on “The Aging Challenge” and “The New Age of Aging.”

## Planning

### Sally Love Saunders

Stitch Stitch Stitch  
so many stitches to hold  
my life together.  
Basting  
Pinning—re-setting  
fittings.  
Daydreaming; turning slowly  
around in front of mirror.  
I think of sewing machines  
that can stitch so fast.  
And I think of embroidery  
with patient, calm women  
where time is not the issue.

My life—  
combining colors  
seams  
so it will fit  
so it will be smooth.  
I remember as a child  
making doll clothes.  
The pleasure was in the making  
not in looking at the finished product.

**Sally Love Saunders** is a writer, lecturer, workshop leader, and author of many books of poetry. Her work has appeared in literary and scholarly journals as well as in *The New York Times*, *The London Times*, and *The Christian Science Monitor*.



## Learning Resources

## *The Mature Mind: The Positive Power of the Aging Brain*

by **Gene D. Cohen**

*Basic Books, 2005*

*ISBN: 0465012035*

*Cloth, 232 pages, \$25*

### **Reviewed by Michelle Sierpina**

In this well-researched, finely articulated, groundbreaking book, Gene D. Cohen, M.D., Ph.D., director of the Center on Aging, Health, and Humanities at George Washington University, sets out to change the way the world looks at aging. In approximately 200 pages he persuasively offers a hopeful view of aging as a time in life when one can improve developmentally rather than decline; a time when there is promise of positive growth rather than acceptance of inevitable decline.

The author engages the reader, whether lay or professional. Peppered with wise, humorous, and philosophical quotes, the book is enriched by captivating personal vignettes of real people, facing real world aging experiences. Using data collected from over 3,000 interviews, Cohen has identified four phases of development late in life. He defines the phases then insists that they must be somewhat fluid because of wide variation in late life development among individuals. His four phases: midlife reevaluation, liberation, summing up, and encore, are universal, but not experienced universally in the same ways or even the same sequences. Cohen believes there is an “increasing bilateral involvement of the right and left brain hemispheres that is associated with the maturing brain” in realms of both creativity and intelligence (p. 97). Citing recent research, he describes numerous examples of expanded use of both brain hemispheres by older persons. “Our brains,” he asserts, “never lose the ability to learn by forming new synapses, dendrites, and even entirely new brain cells” (p. 101). It is in the second half of life that the brain maximizes coordination, integration, and synthesis among its many modules and hemispheres.

For those who value reminiscence, life review, and lifestory work during life’s later years, Cohen breaks exciting new ground. He asserts that using both sides of the brain is part of an “autobiographical urge.” Occurring late in life, this principally physiological phenomenon compels the storyteller to utilize both sides of the brain. This bicameral approach results in “optimum expression of the full range of factual emotional elements in a person’s life story” (p. 76). Engaging both sides of the brain makes recollections richer, more vibrant, a more joyful experience, “like

chocolate to the brain in later life—a sumptuous activity” (p. 77).

Cohen’s Retirement Readiness Quotient provides readers with practical guidelines for assessing retirement readiness while helping to shape the boundaries and parameters of how one’s retirement might evolve. What follows this self-scoring tool is a “Top Ten” list of techniques to enhance retirement, keep the mind sharp, and improve one’s health. Technique number four recommends enrolling in a course about an unfamiliar topic, exactly the sort of activity a retiree encounters in lifelong learning programs. Number ten encourages the retiree to write a family history or personal memoir, also a common opportunity in lifelong learning institutes.

Valuable appendices, an unexpected bonus in the book, offer comprehensive resources for lay and professional readers including agencies, Internet sources, and carefully chosen books on aging. Cohen directs readers to an innovative, annotated Web site listing 91 books which portray, “aging realistically and positively for children from pre-kindergarten through sixth grade” (p. 223). Accompanying that list is a thoughtful essay, supported by data, about the way young people look at aging individuals both within their own families and in the larger society.

The author has skillfully crafted a scholarly book which demonstrates a rare balance of remaining equally readable by gerontological professionals and by the general public. Cohen quotes Ellen Glasgow, a quote which sums up a key premise of the book’s view of the aging experience. About those over 60, Glasgow says, “One can then begin to live, not simply with the intense part of oneself, but with one’s entire being.” In the final chapter, the author summarizes research on the positive impact of a community-based arts program. “We can, if we want to, learn, grow, love, and experience profound happiness in our later years.” He goes on, “We need not succumb to difficulties, nor need we accept the myths that still exist about growing older” (p. 182). *The Mature Mind* makes a powerful case for abolishing those myths and for seeing aging through a solidly, scientifically supported, positive, and hopeful lens.

**Michelle Sierpina**, Ph.D., directs the Osher Lifelong Learning Institute at the University of Texas Medical Branch in Galveston.

It is in the second half of life that the brain maximizes coordination, integration, and synthesis among its many modules and hemispheres.

## *Living in the Shadow of the Freud Family*

*by Sophie Freud*

*Praeger, 2007*

*ISBN 978-0275-99415-0*

*Cloth, 472 pages, \$35*

### **Reviewed by Adele Baruch-Runyon**

At the threshold of her retirement from teaching, Sophie Freud chose to write a book that told her mother's story, largely through her mother's journals and letters, and adding the voices of her mother's family through their journals, letters, and reflections. This layering of perspectives conveys not only different views of one person (Esti Freud) but also conveys different views of the relationships and events that touched and often shadowed Esti's life. (I refer to first names in this review, not because I am referring to mostly women, but because there are references to many different Freuds.)

In the book's introduction the author speaks of the ways her own perspective of her mother is changing, as Sophie ages and develops a view that is leavened with empathy, curiosity, and admiration. While Esti's life is marked by numerous personal and historical traumas, Sophie resists the temptation to psychologize, at almost every turn. Indeed, she lets the many perspectives speak for themselves, ultimately suggesting a paradox in relation to memory. While memories of one person, such as Esti Freud, may differ significantly, the consideration of multiple memories may convey a closer, while less certain, approximation of that person. Sophie, at one point, described her mother as establishing a "protective presence" for her children, while Walter, Sophie's brother, described his parents as either ignoring or ridiculing his suggestions and wishes. Esti's letters to her children, throughout years of development, estrangement, and dislocation, present a third, still more complex view of her presence in her children's lives.

The writing of this book clearly provided new opportunities for building dimension and relationship between mother and daughter. Sophie poignantly describes the way in which the writing of this book "gave meaning to my suddenly senseless life" (at early retirement). The author articulates the many differences, in life course and personality, between her and her mother, but she also identifies multiple strands of kinship and connection. The reader soon comes to appreciate a common strand of unflinching lack of sentimentality, present in the journals and letters of both women.

It is with an unsentimental yet admiring eye that Sophie presents Esti's life, a life lived not only in the shadow of the Freud family, but a life survived in many shadows, including the Holocaust, dislocation, and the deeply embedded patriarchal traditions of Jewish and 19th-century Viennese culture.

One wonders, as one reads of Esti's nearly complete rejection by the Freud family she married into (most notably, by her husband, Martin, son of Sigmund Freud), how much of it was engendered by simply being a plucky, imaginative woman, entering into a family where men were given enormous creative and intellectual freedom while women were expected to have meals prepared at exactly the same time each day. Sophie does not speculate whether Esti was provoked into moods that were alternately dour, self-absorbed, and explosive by this complete rejection, or whether she brought substantial character deficits into the marriage. She simply notes that the Freud family's view of Esti appeared to confirm her own fears that she was unlovable.

Sophie notes that the mixture of harsh life circumstance and personal inclination led to an interpersonal approach that was highly critical, a characteristic Sophie sees as shared by herself, and most of her immediate family. Yet Esti also seemed to be able to take considerable solace from areas of her life, about which she had little to complain, including, interestingly enough, her children's spouses and their offspring.

The journal entries and letters present contradictory portraits of a woman brave and focused enough to carry out an escape with a young daughter by bicycle from advancing German troops in France and one given to swoons and fits when entering into an argument about finances with her husband. Sophie accepts these contradictions, without attempting to analyze them, while providing a richly drawn context so that readers might better understand them.

The parallel text to the growth and development of Esti's life is the increasing generativity of Sophie's life. In the beginning of the book it is particularly moving to trace the development of her older adult years by reading of an initial sense of dislocation described in early retirement. Sophie's current life story (published in this issue of *The LLI Review*) describes an active reengagement with teaching, this time predominantly with older adults. Repositioning and engagement, after immense dislocation, is a theme that comes across with great light and clarity in the stories of both Esti's and Sophie's lives.

**Adele Baruch-Runyon** is assistant professor of counselor education at the University of Southern Maine with an interest in the ways systemic factors and creativity influence life choices.

## Learning Later

By **Brian Findsen**

*Krieger, 2005*

*ISBN 1-57524-218-4*

*Cloth, 168 pages, \$36*

**Reviewed by Rick Lamb**

For those of us swept up in our enthusiasm for the growth and vitality of lifelong learning institutes (LLIs), Brian Findsen's *Learning Later* raises concerns that deserve serious consideration. Findsen, with over 20 years' experience as an adult educator in New Zealand, the United States, and Great Britain, brings a cross-cultural and cross-disciplinary perspective to his assessment of the current status of educational opportunities for older adults. The conclusions of this analysis are more critical than many of us might have expected or wished for. Findsen argues that societal attitudes and policies related to ageing [sic] continue to be determined by economic considerations that work to the detriment of older adults, and that the gerontological professions, by their failure to give sufficient weight to the social context of older learning, put the continuing expansion of "learning later" opportunities at risk.

Findsen argues that despite their public rhetoric, governmental and private institutions still operate largely to encourage older adults to withdraw gracefully from more active roles in society, and let the younger generations assume the burdens and responsibilities commensurate with their greater capacity and productivity. Behind this seemingly benign policy, Findsen says, is the motivation to minimize the consumption of resources and services by an older population perceived as needy and irrelevant. And, as the author points out, to the extent that society limits the opportunities of its older members their resulting dependence becomes a self-fulfilling prophesy.

While much of Findsen's book is devoted to how the dynamics of prevailing economic forces influence and limit educational opportunities for older adults, he also acknowledges another societal dynamic that acts as a constraint on older learning, namely the perception that older persons have neither the capacity nor the need to continue learning. So pervasive is this attitude that Findsen sees it as affecting the self-image of older persons themselves, thereby contributing to their relatively low rate of participation in formal educational activities.

In a remarkably concise volume Findsen builds his case with a comprehensive and well-balanced review of the key trends and issues in the overlapping but not

always complementary fields of adult learning, educational gerontology, and educational and geriatric sociology. This review provides a context for the central argument of the book—that economic determinism is a far more important force in determining the nature of older adult education than is recognized by most practitioners and theorists.. He especially faults educational gerontology in this regard, claiming that the field tends to address the educational needs of the elderly “in isolation of social context.”(p. 1)

Some elements of his analysis are likely to generate controversy among readers, especially in the United States, where Findsen’s essentially neo-Marxist approach has limited acceptance. However, his presentation gains credibility by a general lack of doctrinaire rigidity that disparages the legitimacy of other views. He is not an absolutist in these matters. He acknowledges the significance of individual as well as sociological determinants in shaping the role and status of older persons. Even though Findsen seems to single out the field of educational gerontology for criticism, his comments are modulated by his acknowledgement of the complexity of the relationship between learning and living, and the need to maintain a balance between psychological, sociological, and cultural explanations of aging. He also seems particularly partial to the humanistic orientation provided by such luminaries as Erik Erikson, Abraham Maslow, and Harry (Rick) Moody.

Findsen is generous in his praise of institutes for learning in retirement (although he does not seem aware of the more current terminology of “lifelong learning institutes”) found in North America and universities of the 3rd age (U3A) operating in Europe and elsewhere around the world. He notes their common attributes of low fees, absence of entry requirements, student empowerment, absence of tests and grades, extensive use of peer teaching, and focus on intellectual stimulation. He sees these student-centered models as close to ideal, while recognizing the limitation that they tend to only attract predominately white, middle-class, and well-educated adults. But at the same time he indicates considerable skepticism about the general willingness of traditional institutions of higher education to accommodate the needs and priorities of older adult students. Findsen’s doubts extend to the relationship between LLIs and their affiliated universities, citing what he sees as “their ambiguous existence at the margins of the academy” (p. 94), restricted resources and limited contact with other students, or input into university affairs. He expresses a preference for the British model in which the U3A’s are small and totally independent institutions.

It may well be that Findsen’s failure to acknowledge the diversity of operational models within the spectrum of university affiliated LLIs is simply the result of a lack of up-to-date information about their development and growth. Indeed my only significant disappointment with the book was the lack of a more extensive analysis, even if critical, of this truly radical educational development. Nonetheless, Findsen’s lack of currency about LLIs should come as no surprise. One does not have to live more than 8,000 miles away to miss out on the LLI story. Those of us who know about these programs are constantly confounded by otherwise active and intellectually curious older adult friends and associates who are unaware of the existence or availability of LLIs. The question does arise, however, as to what are the implications of the development of these programs despite apparent public indifference and the lack of clear-cut economic incentives. If, as Findsen suggests,

*Learning Later*

support for creative late-life learning initiatives could be undermined by more powerful sociological and demographic forces, we ignore this potential at our peril.

In his effort to present a comprehensive sociology of older adult learning Brian Findsen has undertaken a daunting task in acknowledging and exploring the many dynamic variables that are making an impact on aging. The result is not without its contradictions and ambiguities. However, these gaps should be seen not so much as deficiencies but opportunities for further study and thought. We still have much to learn about learning later, and Findsen's book can serve as a useful guide in the process.

**Rick Lamb** is an active member of the OLLI at the University of Southern Maine and serves as associate editor of *The LLI Review*.

## Changing Course: Navigating Life After Fifty

By William A. Sadler and James H. Kreft

*The Center for Third Age Leadership Press, 2007*

ISBN-13 978-0-9793510-5-1

ISBN-10 0-9793510-5-7

Paperback, 260 pages, \$19

### Reviewed by E. Michael Brady

While this book can be easily read and enjoyed on its own, it is sequel to *The Third Age: Six Principles for Growth and Renewal After Fifty* written in 2000 by one of its co-authors (William Sadler). In *Changing Course: Navigating Life After Fifty*, Sadler, who teaches sociology and business at Holy Names University in California, is joined in authorship by the president of The Center for Third Age Leadership who is also a consultant and executive coach.

The primary message in *Changing Course* is the need for people to re-think retirement. The book's title infers that the later years, much like early stages in the human life course, may be depicted as a voyage and therefore require careful thought and planning. This book serves as a navigational chart of sorts to help middle aged individuals explore the myriad possibilities for growth and success in their 60s, 70s, and beyond.

A significant aspect of re-thinking the later years is to re-invent a language for retirement. Instead of the well-worn "D words" that are often used to describe life after leaving full-time employment—difficulty, decline, deterioration, disease, disengagement, dependency—Sadler and Kreft offer a refreshing set of "R words:" renewal, reinvention, regeneration, rediscovery, rejuvenation. In other words, they advocate for a fresh look at aging.

The term "third age" is explained. It is a phrase commonly used in Europe, Canada, and Australia and one which is now catching on in America. Generally speaking "third age" has less negative baggage associated with it than "late middle age" or "early retirement years." According to Sadler and Kreft, because the term is so new in the United States it generates questions and that can be a starting point for opening minds. The third age is the period between one's mainstream working years ("second age") and the oftentimes more frail elderly years ("fourth age"). For many of us this means two or more decades during which we can normally expect to have good health, ample financial resources, and substantial energy for undertaking new, creative, and challenging activities.

While not a "workbook" *Changing Course* offers the reader opportunities for interaction. For example, in a chapter entitled "Principles of Third Age Growth and



*Changing Course:  
Navigating Life After Fifty*

Renewal,” the authors list a series of questions that invite the reader to take stock of their own lives: What do I value most? What should I let go of and what do I want to keep? What is my passion? What kind of person do I want to become? How can I find new ways to nurture both others and myself? What difference will my life make? As the late poet John Ciardi once remarked, good questions are infinitely generative. The questions asked in this chapter and other places in this book can, indeed, go a long way to inspire careful thought and planning for the aging individual who wishes to have a productive and happy third age.

One of the most important aspects of this book is its stories. The authors have spent many years talking with successful third-agers and have developed a series of detailed case studies that they liberally share. The reader gets to know details and nuances about the lives of people who have successfully navigated the sometimes difficult and dangerous waters of late middle age and beyond. Stories can often be among the best of educational tools and Sadler and Kreft use the personal stories of their research interviewees effectively to elucidate the principles they aim to teach.

Two key ideas stressed in this book are the challenge of re-balancing work and leisure and the development of what the authors call a “Third Age Portfolio.” Many happy and successful older persons nowadays have learned to blend the continuation of work (part or full-time) with creative leisure activity. This is a dynamic that allows people to redefine their retirement years to fit more closely with the individual they wish to become. In the words of Sadler and Kreft, “retirement is not a fixed stage but an emerging process of renewal. Not a finish line, but a new set of starting blocks.”

The third age portfolio was a key theme in Sadler’s aforementioned earlier book, and *Changing Course* further develops this notion by providing examples from the lives of successful third-agers. One of numerous examples is a 68-year-old woman whose third age portfolio consists of an assortment of activities. These include intellectual pursuits (e.g., personal reading and graduate school), movies, physical activities such as biking and canoeing, participation in women’s circles, writing poetry, travel, quality time spent with friends and family, and an active spiritual life involving daily prayer, meditation, and reflection. This wide-ranging and robust portfolio helped “Susan” to overcome numerous challenges in her 60s including a bout with cancer.

My criticisms of *Changing Course* are minor. As a reader who often likes to pursue ideas and sources that are mentioned in a book by researching and reading more about them, I was surprised by the casual approach the authors take to referencing. When a study is mentioned in the body of the manuscript that supports a point the authors are making, it is not accompanied by a footnote or reference. Perhaps Sadler and Kreft did not want to burden readers with details that would interrupt the flow of the narrative. That said, at the end of the book I was pleasantly surprised to discover a section of “Notes” which point the more scholarly reader in the direction of selected studies mentioned earlier.

A second concern has to do with voice. While the cover and title page clearly denote that *Changing Course* has two authors, and the book mostly reads like it was indeed written by a team, there are places where only one author speaks. For example, early in the book we read “Jim and I feel as encouraged by recent discoveries”

and, a few pages later, “how to develop what I’ve called ‘second growth’... “ The reader is forewarned in the introduction that two of the chapters were written individually. Nonetheless, this switching of voice was noticeable and slightly irksome although it does not detract in any substantial way from the overall value of the book.

In summary I found *Changing Course: Navigating Life After Fifty* to be a superb read. It is intelligent and provocative. The authors effectively balance ideas and theory with examples and concrete applications. I believe the already inquisitive and active members of lifelong learning institutes who are re-thinking and planning their third and even fourth ages will benefit from reading this book.

**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 editor of *The LLI Review*.

Many happy and successful older persons nowadays have learned to blend the continuation of work (part or full-time) with creative leisure activity. This is a dynamic that allows people to redefine their retirement years to fit more closely with the individual they wish to become.

*The LLI Review***The Annual Journal of the Osher Lifelong Learning Institutes**2008 Call for Papers

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*The LLI Review* is an annual publication of the Osher Lifelong Learning Institutes' 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 fifty. 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 = 5,000 words)
- Research briefs/abstracts (500 words)
- Essays that involve a critical review of literature and/or original thought on an issue that is salient to mature learners but which is not necessarily based on empirical data collection (5,000 words)
- Book reviews (750 words)
- Articles that describe "best practice" in curriculum design and/or teaching in LLI's. (2,500 words)
- "WOW! Programs" These are detailed descriptions of especially creative or successful courses or programs. What took place? Why was it so successful? (2,500 words)
- A personal story/memoir related to participation in a lifelong learning institute or other learning experiences in later life (2,500 words)
- Brief fiction related to teaching and/or learning in later age (2,500 words)
- Poetry (no maximum length, but brief is preferred)

Manuscripts should be prepared in Microsoft Word, double-spaced, and use 14-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, 2008**

**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  
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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.

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## 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.