Elderly, Education, Intergenerational Relationships and Social Development. Proceedings of 2nd Conference of ELOA

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(Eds.)

University of Minho
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Foreword

Population ageing has been a topic that has received much attention from different social players such as politics and academia. This interest and concern is due to several factors, in particular the social and economic consequences involved.

However, as far as public policies are concerned, the areas of intervention in some countries are confined to the health and social spheres. Without prejudice to the importance of these two areas in the life of the elderly, in particular for those with fragile health, weak support networks and low income, we should also take into consideration the role of education at this stage of life.

The Network on Education and Learning of Older Adults (ELOA) of ESREA, emerges therefore as a discussion forum where a diverse range of issues regarding the knowledge on the education of the elderly and related experiences are shared. Within this framework, the second conference wishes to continue the work started in October 2010 in Munich.

The present document aims at capturing the debate undertaken during the Second Conference of ESREA, on the 25, 26 and 27 October 2011 at Minho University, under the auspices of the Department of Social Sciences of Education – Institute of Education and the Adult Education Unit.

The proposed theme “Elderly, Education, Intergenerational Relationships and Social Development” lends itself to the contemplation of several approaches and issues.

The wide range of topics discussed is evidenced through the different communications tackling issues such as Active Ageing, Third Age Universities, Social Development, Intergenerational Relations, Life Long Learning and New Technologies for the Third Age. It is worth noting that the communications also offer different types of analysis on the topics discussed. Whilst some communications take on a macro analysis perspective contemplating policies, others take micro approaches such as Social Practices. This diversity is also present in the nature of the communications themselves with some taking on very academic and scientific stances whilst others are of a more practical and descriptive nature. All of them however, have made a very positive contribution to this debate, enriched the debate and offered opportunities to share different types of knowledge and experiences.

Esmeraldina Veloso
An Age of Centenarians?
Lifelong learning policies and ageing

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Ageing is now a major issue in many countries of the world and it is a paradoxical problem that will not go away in a hurry: paradoxical because most of us want to live for as long as we can (or at least this is the general feeling) but many countries in the world will not be able to afford a very old population in terms of pensions and health and social care. It is this problem that underlies this paper about lifelong learning policies and ageing. We are certainly living longer. The life expectancy of people in many parts of the world is increasing and in some counties, like Korea and other Far Eastern countries, it is very rapid as the following table demonstrates.

Table 1 - Life Expectancy (years) – East and West

<table>
<thead>
<tr>
<th>Year</th>
<th>Japan</th>
<th>Korea (South)</th>
<th>Macau</th>
</tr>
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<tbody>
<tr>
<td>1960</td>
<td>67.7</td>
<td>54.2</td>
<td>58.6</td>
</tr>
<tr>
<td>2009</td>
<td>82.9</td>
<td>80.3</td>
<td>80.9</td>
</tr>
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<table>
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<tr>
<th>Germany</th>
<th>United Kingdom</th>
<th>USA</th>
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<tbody>
<tr>
<td>1960</td>
<td>69.5</td>
<td>71.1</td>
</tr>
<tr>
<td>2009</td>
<td>79.9</td>
<td>80.1</td>
</tr>
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(World Bank downloaded 25.9.11)

In the above table, three countries have been selected from each East and West as examples of life expectancy trends over the past fifty years and we can see immediately that the East started with the lower life expectancy in 1960 but in each case it now has a higher life expectancy. This in itself is quite indicative of how life style and living standards have changed during this period and it is a small indicator of how the West is losing much of its pre-eminence in
the world. With life expectancy being greater than 80 years in all the listed Eastern countries – although obviously not all the countries in the world - it is now being suggested that many children born at this time could live to be a hundred and with the way that Korea’s life expectancy is increasing, it is hardly surprising that some people there are talking about the age of centenarians, or as it has been called in the USA, the Age of Methuselah. Indeed centenarians are no longer such a rare breed of people – in the UK on Older People’s Day (1st October, 2011) it was estimated that there were at least 12,640 centenarians, and in the USA where there is now a National Centenarian Days (23rd September, 2011) it was estimated that there were at least 70,500 although estimates vary but in 1950 there were probably only about 2,300. The New England study which is now also looking at super-centenarians – that is people who have reached 110 - estimated that in 2010 there were between 60 and 70 but in UK there were only 10. There have been many major studies of centenarians in recent years, especially in USA, Europe and Japan and I want to make reference to one in Japan (Okinawa) and two in USA (New England and Georgia) here.

Most of the studies of centenarians have, needless to say, assumed a medical perspective and have been published in medical and gerontological journals and so it is not surprising that journals such as 'Educational Gerontology' do not contain many references to them and we, in educational gerontology, have tended to look at ageing rather than the very old although we are now making more reference to the fourth age (Withnall, in press).

In this paper I want briefly to refer to these studies and then raise a number of issues that surround them in terms of public policy and lifelong learning. I want to pose four questions in this paper: Why study centenarians? Can we achieve an age of centenarians? What policy issues does such an ageing society have to address? Finally, how does lifelong learning relate to these policy issues?

**Part 1 - Why study Centenarians?**

The fact that centenarians have lived to be 100 years old is sufficient reason for studying them since they have survived for so long and may, therefore, offer us evidence of successful ageing - for as Findsen and Formosa (in press,p.7) point out this is the 'age of ageing. Apart from great age, however, centenarians do not seem to have a great deal more in common. In fact the New England study makes it clear that 15% of their sample population had no clinical disease at 100 years old – they were the escapers, but 43% were the delayers since they did not exhibit age-related illnesses until they reached 80 years of age and 42% were the survivors since they did have clinically related disease before that age (www.bumc.bu.edu/centenarian/overview) – (hereafter the New England study). Indeed, the Georgia study suggested that centenarians are 'community-dwelling, cognitively alert, and generally vibrant and full of life’ (www.publichealth.uga.edu/geron/) – (Georgia study) and it was this attitude as much as anything else that results in a long life. Consequently, the studies into happiness are important
at this point since happiness lengthens life expectancy (Layard, 2005, pp.23-24), but the Georgia study also points out that by the age of 100 at least 50% have some form of dementia and, naturally, some 60-70% have some form of disability. The Okinawa study, however, found a much lower rate of dementia than the Georgian one (www.okicent.org/study.html) – (Okinawa study) which points us to a stronger link between lifestyle/culture and ageing. Consequently, it is clear that reaching this great age is not only a genetic matter – the Okinawa study which focused specifically on genes reached the conclusion that estimates vary between 10% and 50% that the cause of longevity is genetic and the researchers elsewhere conclude that about one third of the human lifespan might be heritable. The New England study also reaches a similar conclusion – only 20-30% attributable to the genes, but it is also recognised that women are more likely to become centenarians than men – as the Georgia study also shows.

At the same time some of these studies have highlighted aspects of living that the researchers feel has contributed to long life:

Elderly Okinawans were found to have impressively young, clean arteries, low cholesterol, and low homocysine (a amino acid that damages arterial walls) levels when compared to Westerners. These factors help reduce their risk for coronary heart disease by up to 80% and keep stroke levels low.

Their healthy arteries appear to be in large part due to their lifestyle, diet, regular exercise, moderate alcohol use, avoidance of smoking, and a stress-minimizing psycho-spiritual outlook.

(Okinawa study, p.3)

In precisely the same way the Okinawans are less exposed to the potentiality of cancer since they have a low calorific intake (eating until they are only about 80% full!), high vegetable consumption, higher intake of good fats and high fibre diet. Significantly, however, Olshansky et al (1990) have suggested that life expectancy in the West might decline over the next half century because of our diets and life-style. They cite specifically infectious diseases and obesity, both of which have risen in recent years – although medical advances will allow for a slow rise in life expectancy in the first part of this century.

These studies have highlighted a number of elements that have assisted the centenarians to live longer. Clearly the Okinawa study points to diet and avoidance of smoking, exercise and to a stress-minimizing life style. The New England study concurs with these findings and suggests that centenarians are better able to handle stress and that dementia is not inevitable in old age. They also found that there is while genetics might only play a 30% part in long life, there is a considerable clustering of longevity in certain families – but this can relate to life-style as much as genetics. This assertion is supported by a study of Seventh Day Adventists at Loma Linda University in the USA where it was discovered that, as a group, their life expectancy was 88 years for men and 89 for women. This was attributed to life-style: vegetarian, no
smoking, they exercise regularly and spend a lot of time with their family and their religion. While this study clearly demonstrates that Americans have the genetic make-up to live to their mid/late 80s, it is to be noted that those with a less rigorous life-style tend to die 8-10 years earlier.

What we are clearly seeing from the centenarian studies is confirmation of the characteristics of healthy ageing that have been undertaken in many other research projects. Swindell (2009), for instance, cites the MacArthur Foundation Study for successful ageing which points to: low risk of disease, high mental and physical function and an active engagement with life. Swindell suggests that these three components result in five-fold model of successful ageing:

- to be concerned about diet/health – low risk of disease;
- to be involved in mental activity;
- to be involved in physical activity;
- to do interesting things;
- to be involved with other people.

Swindell suggests that being involved in physical activity is the most significant of these five and the Okinawa study suggests that high physical activity lessens the risk of osteoporosis, amongst other things. However, it is significant that when an older person moves into a care home the Georgia study showed that amount of physical activity declines by about one-third and this facilitates a decline in health. At the same time there is some evidence to suggest that diet is also a most significant factor in successful ageing, as we will see below. However fundamental these five elements are to successful ageing, they do not tell us the whole story.

Part 2 - Can we achieve an Age of Centenarians?

It is clear from the New England study that they think that the evidence from their findings suggests that people in the USA could have a life expectancy of between 85 and 90 years but Olshansky’s study suggests that because of lack of concern about diet and health in the USA even the present rate 78.7 years could decline a little in the coming years.

In contrast, the Okinawa study tends to suggest that given the right culture and life style there is a greater chance of achieving an age of centenarians, or a society of centenarians. Any society could do it is the claim made by some who have studied Okinawa, such as Craig Wilcox (Wiseman (2002). Indeed, there is a famous saying carved into a rock in Okinawa:

At 70 you are still a child, at 80 a young man or woman. And if at 90 someone from Heaven invites you over, tell him: ‘Just go away, and come back when I am a hundred’
But by 2005 changes were taking place amongst the Okinawans – some 100,000 emigrated to Brazil and they immediately assumed a Brazilian diet and the life expectancy of these Okinawans is now 17 years lower than that previously in Okinawa – but things are also changing in Okinawa too: the younger generation have discovered fast food and men under 50 in Okinawa now have Japan’s highest rates of obesity, heart disease and premature death (Wiseman, 2008 [2002]).

Olshansky’s predictions have proved true for Okinawa, and maybe they will for the USA and Western Europe and so we might not achieve an age of centenarians although increasing numbers of people are likely to achieve this age because of their awareness and adherence to the criteria of healthy living. But the attraction of fast food, amongst other things, is not conducive to achieving this age and so we can only expect a gradual increase. Even countries like Korea, with its rapid increase in life expectancy might expect to see this increase slow down but there might be a very slow increase in life expectancy towards the mid- to late 80s, as the New England study suggested. Some researchers, however, believe that there is a natural age limit controlled by our genetic make-up. But as we have already seen the New England study suggested that nature is responsible for no more than 30% of our life chances – nurture, culture, life-style are all major players in this process and as the Okinawa study also shows, if we change the latter then the chances of living longer decline.

However, there is another side to this discussion: successful ageing is now being assisted by medical advances, although we cannot always predict when scientific discoveries will take place or precisely what effect they will have. Medical advances in many disciplines but especially in molecular biology may affect both the nature and the nurture aspects of living since they can both influence the genetic aspects of our lives and treat physical and even psychological illnesses. These advances are affecting our mortality rates and enabling us to live longer despite our bad life-styles. Indeed, with the tremendous advances in medical science, we may see life expectancy enhanced considerably and the age of centenarians may still dawn. Indeed, it is predicted that with the biomedical revolution could have important demographic implications with life expectancy is gradually increasing towards the century, and even beyond it (Aaron and Schwartz 2003, p.2).

Consequently, it is important that we research people who reach this extreme age because they may provide us with a great deal of information that will be useful as increasingly more people reach this age and have implications for both social policy and social morality.

**Part 3 - Ageing and social policy**

The ageing society is already having effect both on government policy but also on our own life styles and in the United Kingdom the Centre for Policy on Ageing (www.cpa.org.uk) pointed out that in the Queen’s Speech of 25th May 2010 there were five Parliamentary Bills that impinged on the lives of older people:
Additionally, there are commissions examining the quality of care, the funding of care, and so on. But awareness of the coming difficulties, partly but by no means entirely created by this age of austerity, means that governments are trying to extend working life and lower pension and other welfare benefits. In response we are also seeing the working people demonstrating, striking, and so on because they are both being expected to work longer and to get lower pensions. Even if we leave aside the current age of austerity for the moment, we can see that longevity confronts us with some major questions that underlie civil unrest and social instability, such as:

- Can we afford to have an age of centenarians?
- How can we cope with this increasing problem?
- Should we be trying to cope with it?

These are questions that we cannot expect to answer in this paper but ones which we must confront since what we see happening at the present time is just the beginning of a process that will continue. Added to this is the uncertainty caused by the fact that we cannot predict how advances in bio-medical research will affect life expectancy but we can at least assume that it will continue to lower mortality rates and therefore increase longevity. Aaron and Schwartz, however, point out that increasing longevity will generate economic problems and ethical dilemmas, and in this they capture some of the more theoretical debates in Moody’s (1998) study in a very practical manner. They write (2003, p.4), for instance, that

Current population aging is already likely to lower both saving and investment in high income countries and to increase the saving in middle-income and poor nations, pushing foreign trade balances of rich nations into deficit and those of the rest of the world into surplus. A 2-percent-a-year reduction in mortality rates would intensify these effects. Saving would decline sharply, investment somewhat less. With mortality falling fastest in nations that can afford medical innovation, trade deficits are especially likely for the rich nations.
But there are also ethical dilemmas that we have to confront since bio-medical advances will continue to enable the life-span to be lengthened through more efficient medication and through genetic engineering. This will give rise to numerous questions about the very nature of our humanity. Indeed, some prominent thinkers are already asking whether life extension is a legitimate goal for scientific research at all: they argue that a ‘quest for superhuman intelligence, looks, or longevity is quite literally inhuman’ (Aaron and Schwartz, 2003, p.5). They say that we should acknowledge our humanity which demands recognition of our finitude rather than endlessly chasing longevity which may not actually result in a richer world or the discovery of the good life. This is precisely the question Moody (1998, pp.97ff) raised when he asked whether we should ration health care for older people. Indeed, this question is already hitting the headlines and while this presentation was being prepared the following headline appeared in a popular daily paper in UK.

‘Don’t give out cancer drugs if it’s just to extend life’

(Borland - Daily Mail)

The reasons underlying this headline had both of an economic and an ethical dimension – the drugs are extremely expensive and the money could be better spent elsewhere, and often the drugs give patients false hopes. An immediate response to this argument, however, is that it is wrong to write-off cancer patients some of whom survive for a number of years as a result of their medication. Fundamentally, they argue, the patients must be given the opportunity to extend their lives at whatever cost and so we can see that the public debate has already begun.

**Part 4 - Framing lifelong learning policy in an Age of Centenarians**

As we can see from the above discussion, no society in the world will escape the complex and uncertain problems that longevity will cause. The future is uncertain and each society needs to frame its own policies in order to sustain its survival and stability in the light of an ageing population and I want to suggest five criteria that need be considered. Each society must:

- be able to support itself in a competitive world – production - work;
- have structure and just laws – citizenship;
- have an established social and educational system - culture;
- be concerned for its people – welfare and individual fulfilment;
- be concerned for its environment.
All lifelong learning policies about successful ageing need to fit into this framework and so we will examine each criterion in turn, but before we do this we need to understand lifelong learning. Traditionally it has meant from learning from the cradle to the grave – mostly provided by the state and a number of private prodders (such as employers), but this is a rather simple, tautologous definition. Learning is much wider than education and a great deal of lifelong learning policy is formulated in educational terms rather than personal ones and so they miss a very important element in human learning. In my own work I am developing a much more complex approach to learning but the definition I (Jarvis, 2009, p.35) used in my book Learning to be a Person in Society will suffice for this discussion:

The combination of processes throughout a lifetime whereby the whole person – body (genetic, physical and biological) and mind (knowledge, skills, attitudes, values, emotions, meaning, beliefs and senses) – experiences social situations, the content of which is then transformed cognitively, emotively or practically (or through any combination) and integrated into the individual person’s biography resulting in a continually changing (or more experienced) person.

Through this multitude of processes – not all requiring teaching - we learn throughout life and in every case which we are discussing people need to understand the situation and the national response to it. Indeed, they need to play their part both in framing the response and also in implementing it – it is a matter of knowing and doing – knowing ‘why’ and responding ‘how’ to the situation. Significantly, much of this debate should occur publicly during the whole of people’s lives rather than at the end – it really should be lifelong education! The aim of government should be to create a culture of learning and involvement. This is the nature of the learning society – that the people learn together about how to live in this complex and ever changing society and we have already shown that government needs to take the lead in encouraging healthy diets throughout life in order to lower the potentiality of future illnesses and increase life expectancy.

We can now return to the criteria underlying lifelong learning policy and we will discuss the first four: the fifth – learning to care for the environment – might be regarded as part education for citizenship and, as such does not need further discussion here.

Societies must be able to support themselves in a competitive world - work: That older people will need to contribute to society to enable it to support itself is perhaps a truism – but it is still newspaper headlines, so that The Daily Mail (again) (2011) could carry a headline commenting on a report by the accountants Pricewaterhouse Coopers that read:

‘Young people starting their first job will not qualify for a state pension until they are 72’. 
The working life will need to be extended to at least 50 years and maybe longer if society will be able to support itself and people will need to understand the reasons for an extended working life – another challenge for lifelong learning. Indeed, the whole nature of retirement comes under discussion – is it an obsolete concept (Moody, 1998, pp.315ff) or is it important for older people to leave the paid work force so that younger people may be assured of work? For however long older people stay in the work force, there needs to be policies that enable them to:

- keep abreast with the knowledge and skills required to continue to practise their current occupation;
- learn new knowledge and new skills and enter a new occupation – including older persons' apprenticeships;
- volunteer and work in new or different social activities;
- gain advice about how they can continue to contribute to the maintenance of society through active work;
- retain a sense of dignity and identity in the world of work.

Additionally, organisations might continue to develop the use of older workers as mentors – even mentors of managers, as a number of companies are doing (Jarvis, 2001, pp.86-89): training for elder mentors might also become an active policy initiative.

But younger people, especially managers, need to be trained to recognise both the competencies and the needs of older workers and work organisations may have to adapt some of their practices in order to facilitate the use of older persons' knowledge and expertise – in this sense work organisations need to become learning organisations.

*Societies must have structure and just laws – citizenship:* It is the right of every citizen to work to create a better society, to ensure that its laws and practices are relevant and just, so that all members may realise their humanity and live together in peace – even those who are extremely old and frail. Clearly elderly and unwell people are at risk in a society confronted with the types of problem to which we have already alluded and we have already seen some of the public debates that are beginning to occur: these will continue, but older people should neither feel threatened by them nor be passive bystanders but active participants in them for as long as they can. Indeed, they might be given assertiveness training (Jarvis, 2001, p.129) so that they can play more active roles. Whilst active citizenship itself cannot be taught, older adults can be empowered and be encouraged to play a more active role in citizenship issues. Opportunities for all people to exercise their citizenship rights should be established – including their rights to live or die.

*Societies must have an established social and educational system – culture:* There are fundamentally two forms of education – the formal and the non-formal. Whilst the formal education system is usually the preserve of younger people, it should always remain flexible
enough for older people to participate and achieve within it. At the same time non-formal education, which traditionally has lower status and is more poorly funded, might be regarded as the preserve of older people. However, in a society of elderly people non-formal education needs adequate funding – both in its face-to-face and distance forms. Institutions like the University of the Third Age, University of the Fourth Age, the Elder Hostel Network and the Men’s Sheds movement all need to be established and supported so that the old and the very old might participate. Many of these face-to-face institutions provide not only opportunities to learn, but opportunities to form social networks in later life and such networks, even electronic ones, were also found to be conducive to health and well-being. Elders might also be encouraged to undertake their own research through these organisations since they understand the experience of being old better than any younger researchers.

*Societies must be concerned for their people – welfare and individual fulfilment:* Naturally there comes a time when elders do not want to play such active roles, or they are prevented from so doing by ill-health. As we pointed out earlier in this paper the Georgia study showed that by the age of 100 at least 50% have some form of dementia and, naturally, some 60-70% have some other form of disability: in such vulnerable times, societies need to provide the necessary welfare support and still provide opportunities for self-fulfilment. The concern for the Other is the beginning of all morality and for society to survive it must be based upon a responsible caring morality. Institutions like the University of the Fourth Age and other non-formal learning institutions, such as mobile libraries, might play a very significant role in helping older people to continue to learn as they lose their physical mobility. Consequently, the provision of personal computing and other facilities for social interaction for the very old are important in order to facilitate continuing personal learning. However, this learning need not be only individualistic since older people can learn with younger members of their families and friendship groups: intergenerational learning should be encouraged and in some of these situations the elders can become the teachers and in others they can be the learners.

Additionally, nurses and care workers need special training in working with the very old and this needs to become a priority in their professional development so that they learn to move beyond the medical model of caring to a broader personal one in which both the humanity and the wholeness of the person, including their spirituality, is recognised and appreciated. Carers need to understand the significance of learning and remembering in all life situations, so that it should always be regarded as a part of care and therapy (Jarvis, 2001, p.144). However, it is not only caring but counselling the elderly that is imperative, especially in times of life and death, so that this demands an expansion of professional counselling training.
Conclusion

The potentiality of an age of centenarians raises vast questions for both social policy and educational gerontology. Most of our studies of the elderly are really about third age people but in a recent report in the UK (Schuller and Watson, 2009) the life span was divided equally into four quarter century divisions – the fourth stage is about those elders who are 75+. The authors write (2009, p.99):

The fact that life expectancy is now lengthening to a historically unprecedented extent, generating new learning needs. The increasing size of this age group poses specific challenges to the goals and meaning of lifelong learning policy and practice. On balance, we argue that identifying 75+ as a stage in the broad sense we have adopted opens up positive opportunities for innovation, and meaningful learning.

The opportunities are there but the situation is complex and not easy to unravel – but every facet of society is being or going to be affected by these changes since this stage is the fastest growing of them all. The age of ageing is a challenging time which demands new educational policies and new practices.

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Lifelong learning, generational solidarity and community development

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Abstract

This paper will account for a theoretical relation between the concept of lifelong learning and the concept of intergenerational learning. An intergenerational project in Sweden which is a practical example of generational solidarity and how this can affect community development will also be included.

The experience of lifelong learning in Sweden can be traced back to the 1960’s. Adult education has taken place in different settings that have been both formal and nonformal. One setting is the folk high school which has contributed to education of both young and old adults. The intergenerational project which is introduced includes older men, +55 that have been working as support for young people in schools. These older men receive an introductory education at folk high schools during one semester before entering their work in the school. The course consists of both theory and practice which gives them a possibility to adapt to a new situation as most of them went to school during the last century and many things have changed.

The project developed out of the work of two men and has become a national association. There are now other projects developing out of the same model. The model has shown a possibility to create social capital (Coleman 1988, Boström 2002, 2003) which contributes to both generational solidarity and community development. An extended version of this model will be suggested in order to expand the connection of lifelong learning and community development.

Keywords: lifelong learning, intergenerational learning, intergenerational solidarity, community development, social capital.
1. Lifelong learning and intergenerational learning

The Swedish government has placed emphasis on lifelong learning since the end of the 1960s, when the minister responsible for education at the time, Olof Palme, introduced the concept of recurrent education at a meeting of OECD ministers of education. Policy in that time was much based on research, especially of Torsten Husén. In his articles he argues about loss of talent in the selective school systems (Husén, 1960). He argued for international comparisons (Husén, 1964). In Educational change in Sweden he describes “…the events on the educational scene in Sweden after 1945 to be seen within a socio-economic framework” (Husén, 1965, p.181) and in an article the following year describes the most important educational problem which many countries faced at that time. Upper secondary education was the problem and the reason was twofold. One force to consider was the increasing need for highly trained manpower and the second force was the democratisation of schools. Both forces were strong political forces “…aiming at making ‘the educational facilities’ available to all young people irrespective of their place of residence, financial level or general social background” (Husén, 1966, p.250). In 1968 he published his article “Lifelong Learning in the Educative Society” where he discussed formal education in relation to vocational education and foresees that the future will require a longer period of formal education and education during different phases in life.

The Swedish educational system is constructed in a way that promotes lifelong learning in various ways. In order to illustrate this education system this is schematically presented in Figure 1. The existing pathways that facilitate mobility between the various levels of education are also indicated. The shaded oval area in the lower section of Figure 1 represents pre-school education, primary-school education and centres for after-school care. Current policy is for a team of primary teachers, pre-school teachers, and staff at the centres for after-school care to be jointly responsible for teaching the pupils during these early years. These categories of education which previously had constituted separate institutional settings for education are now melded together so that their activities extend along the whole continuum, from formal education, on the left-hand side, through to informal education, on the right hand side. The intention is that this unified setting provides an adequate foundation for lifelong learning.
There is no upper age-limit for commencing university studies, so that even after the official retirement age, there are opportunities available for senior citizens to commence studies at this, or some other, level. It is, in fact, these senior citizens who form the backbone of participants in voluntary forms of popular education (as indicated in Fig. 1). One form of popular education, established in Sweden since the latter part of the 19th century, are the programmes offered through what are known as “study circles,” which at present are organised by 11 nationwide voluntary educational associations.

Another form of popular education is that offered by what are known as folk high schools, about 150 throughout the country, and which are run either by county councils or by trade unions, churches, temperance societies or other non-governmental organizations. The programmes they offer are largely residential and they are more comprehensive than those provided by the voluntary educational associations. The latter are usually affiliated with a political party or interest organization. Both folk high schools and voluntary educational associations receive state subsidies while remaining very free to organize the courses and to develop the contents much as they wish. Intergenerational learning is an entity of lifelong learning can be defined as:

“Intergenerational programmes are vehicles for the purposeful and ongoing exchange of resources and learning among older and younger generations.”

(Boström, Hutton-Yeo, Ohsako and Sawano, 2000, p.3)
A model of intergenerational learning in adult education can be shown in Fig. 2. The participants are often older than the teachers. The learning takes place in a formal setting. In the case there is training in the workplace there could also be staff and mentors who are transferring their informal skills and knowledge to the participants.

![Diagram showing a model of intergenerational learning](image)

**Fig. 2** - A model of how social capital is created by intergenerational cooperation

In the relationships between the participants and their educators, trainers and mentors there is also a transfer of values. The communication between them and the social network where they are learning creates social capital. In the European level this cooperation can support intercultural understanding in the networks by communication. On this level there is a possibility for and increase in social cohesion.

### 2. Increasing social capital in the Granddad program

The theoretical background rests on both a lifelong perspective and a lifewide perspective of learning. The lifewide perspective includes both formal and informal learning. Indicators to measure social capital were constructed and LISREL was used to analyze the results (Boström 2009, 2011). In addition, a qualitative method was used to analyze the understanding and experiences of their work on the part of the “class granddads.”
The schools that were included in the study were very different. Therefore the granddads entered very different environments when they began their work. The results indicate that the work of the class granddads in itself was part of the social capital that was to be found between the class granddad and the pupils. The responses of the pupils indicate that both boys and girls felt they had equal opportunities in the school, that they felt secure in school and that the class granddad assisted everyone. These results support the proposition that social capital increased for the pupils. The responses from the participating class granddads indicate that, even though their work was very demanding, they still experienced it as being very positive. They gained a social network together with the other adults at the school and very positive energy from the pupils. This indicates that there was also an increase in social capital and well-being for the older people.

![Fig.3 - Social capital in the school (Boström, 2011)](image)

When the granddad is outside during the breaks, he is more on his own, which becomes apparent as an indicator in the data, being a strong component in itself. The work of the class granddad consists of many different parts. The pupils most often refer to the fact that he talks to the children and comforts them when this is needed (communication = a part of social capital), that he assists everyone (security = a part of social capital) and that he sets limits for what is allowed (norms and structure = a part of social capital). In other words, the work of the class granddad contains all the parts that constitute social capital, according to Coleman’s definition (Coleman, 1988). The work of the class granddad, both together with the teacher and outside during the breaks, also influences, in a positive way, the social capital between the pupils and the
teacher. The work of the teacher is very greatly influenced by the relationships between the pupils in the group.

3. Intergenerational solidarity

The class granddads felt that they were needed in the schools, as a support and as a listener and comforter. It was important for them to share their knowledge, experiences and feelings. They wanted to support the less strong but to also to stimulate the strong to go even further. Many of the granddads felt it was important to behave in a friendly but determined manner and to set very clear limits, that were equal for all the children. In addition, time, empathy and patience are considered to be good qualities to have as a class granddad. The circumstances described above, together with their own views about their work, have also meant that the class granddads have been involved with different kinds of duties. Naturally, the class granddad is in the school for the sake of the children, and has been considered as a resource that is available to the school, to the class and to the teachers concerned. The duties of the men have been determined in consultation with the principal and class teacher, on the basis of the needs of the pupils or class, and on the requirements and planning of each teacher, and, of course, taking into consideration the talents and wishes of each granddad. This is based on a selection criterion where, on the part of the male senior citizen, there has been a voluntary wish to participate and take on the role of class granddad, which is an important prerequisite in order for his work to be successful.

The teachers who worked with the granddad appreciated, that he was together with them in various activities and made it possible for the teacher to deal with the children in a better way. The teachers no longer needed to supervise the breaks to the same extent and so had more time to prepare their work for the children. They placed the most value on him having been an additional adult during breaks and who could accompany them on excursions. He was an additional adult, but there more for the children than for the teachers. He had time for the pupils and they liked him. His way of working was very flexible – nothing was impossible – he really wanted to be of assistance. When required to do so, he was also able to assist in resolving emergencies. The class granddads in each case have developed their own professional role. None is like any of the others – this reflects the flexibility in the professional role. Assistance with homework, gymnastics, woodwork, outdoor activities, each indicates that they find the activities where they can meet the children outside of the classroom where they are able to be of assistance to a large number of them. The class granddad is seen as an additional factor in providing security and this is particularly important for the “new ones” in the school or those who are graduating to the middle or senior school.

It is necessary to have a positive social environment in order for learning to take place. This may be created through providing basic security in the school environment and the opportunity to be given individual assistance when this is required. Positive social capital may
provide the conditions for a learning society for all – both young and old. In a longer social perspective, the teachers and other staff felt that the class granddad built bridges between generations and improved the quality of life for the pupils by helping them feel secure in school. This is difficult to measure in a shorter perspective, but nonetheless this aspect of the effects of the work of the class granddad should not be ignored. The program has deepened the understanding of meetings between generations in those schools which have introduced a class granddad, an additional adult in their activities. It rests on earlier research on informal learning, which takes place between an older and a younger generation, a part of lifelong learning.

4. The policy level

The Swedish National Agency of Education defined lifelong and lifewide learning in a report (Skolverket, 2000, p. 7):

“lifelong learning is a holistic view of education and recognises learning from a number of different environments. The concept consists of two dimensions. The lifelong dimension indicating that the individual learns throughout a life-span. The lifewide dimension recognises formal, non-formal and informal learning”.

This definition has many practical consequences. The first consequence is that lifelong learning dissolves the boundaries between policy sectors. Indeed, lifelong learning concerns such sectors as education policy, labour market policy, industrial policy as well as social policy. All partners are also involved, from municipalities to county councils and the government, and from employers to social partners and employees. The second consequence is a shift in responsibility for education and learning from the public to the private and civil spheres. The traditional system of education run by the Ministry of Education will be ‘dismantled’ to a multitude of learning environments and actors.

5. The Granddad program involves in community development

During the period between 1996 and 2011 the project has developed quite remarkably. From one granddad 1996 in Stockholm there are more than 1000 granddads all over Sweden. There is one national association and there are ten regional associations. The National Association is an NGO where the board is working on voluntary basis doing the administration and coordination of the regional associations.

The regional associations are also NGO:s and they sometimes have staff when they have funding. The persons working there are the connecting hubs to choose the right people to work in schools in co-operation with the unemployment offices, for introduction of the granddads into the schools by the giving them the possibility to learn about the job in the folkhighschools and for
following up and organizing meetings. The regional associations work together with the regional folkhighschools organize education and training during one semester for the granddads to be. There is a defined curriculum and they also have training in regional schools. After finishing the training there is an exam and if they pass they receive a certificate. The Swedish granddads are working in schools from preschool to upper secondary schools. There are both men and women working as granddads now. At the same time there have been a problem regarding the policy level as to who is responsible for their work. They are working in the schools but the schools do not achieve any funding for their work even if they produce prerequisites for learning by creating social capital in the classroom and in the school.

1996 the project started with one Granddad.
2002 the National Association for Granddads started with ten regional associations
2010 there are 1182 certified granddads

Figure 4 - The locations of the regional granddad associations

6. Complementary actors

According to the Swedish Government (prop. 2011/2012:1) it is important to have a well functioning and effective employment service and unemployment insurance. Therefore it is necessary to regularly follow up how the unemployed person’s uses his/her efforts to find a job. Older persons who lose their jobs face a difficult labour market situation and are at risk of ending up in long-term unemployment or leaving the labour force. There are also many individuals who
voluntary leave the labour force relatively early, for example, via supplementary pension schemes. The government finds it important to encourage a later labour market exit, not least to safeguard the financing of the public sector in the long run. One measure that has been taken by the Government for stimulating the labour supply among older people is the higher in-work tax credit for people who have turned 65. People aged 55-64 can also get new-starts jobs for up to ten years.

The aim of new start jobs, is to provide work experience and references that increase the chances of getting an unsubsidised job. The long term unemployed with limited education may also be in need of further education in order to become competitive in the labour market. The Swedish granddad program combines work with learning. As a complementary agent the regional NGO:s have had the task of introducing unemployed persons to work in schools as Granddads. During this period they also apply for other jobs. Getting the social network in the schools and the social well-being this creates means that employers are interested in them. Several of the granddads have got other jobs even if they also like the work in schools. This has functioned well and the local NGO:s are now also working with young unemployed persons. They are also working in intergenerational settings by helping old people. During this time they also apply for work and by having work experience and wellbeing from their social network they are also more interesting for employers.

There is now cooperation between different agents in the area. The Government has given the Swedish Insurance Agency, in cooperation with the national board of Health and Welfare and in consultation with the Public Employment Service, a remit to further develop instruments for assessing work capacity. Hopefully this will give more impact for intergenerational work and relationships in Sweden.

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Casa Animada: a project for senior quality of life

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Abstract  
Ageing in Portugal isn’t a utopia, is a reality. Since it is a natural process and human biological, has an inevitable consequence, such as: loss of motor, mental and social skills. This way the family has a preponderant role in supporting and monitoring the elderly in this process. But not only. Society in general should be concerned with the welfare of this population, emphasizing this phase of life that everyone experiences.

To address the difficulties experienced by this population, including loneliness and social exclusion is important that institutions develop educational projects that have as their ultimate goal the promotion of life quality for seniors, whether independent or dependent persons. In this sense, the Santa Casa da Misericórdia de Oliveira de Azeméis, was concerned to create a project that is supported by the elderly who benefit from the home support services that may be at risk of social exclusion.

The project is called “Casa Animada” and its main objectives: stimulate learning through life, trying to keep the elderly constantly updating and constant contact with the community, thereby rousing active aging; fun, as it is a animation project is intended that the elderly occupy your time
more useful, dynamic and playful, thereby circumventing some insulation, prevent or mitigate cases of isolation and/or social exclusion within the senior band.

**Keywords:** aging, loneliness, social exclusion, family, life quality.

**Introduction**

Being aging a reality today, it is necessary to make the elderly participate actively in socio-cultural activities and foster their attachment to the services carried out for them, so that keeping the elderly at home is the solution able to reinforce the family and communitarian ties, and so contribute for the promotion of their health and quality of life. However, it is necessary to appeal to the help given by the family circle; it is necessary to develop from support given in the community to support given for the community.

Taking into account this reality, it seemed relevant and useful to us to present this work to find out if the elderly that are stimulated respond more easily to daily demands.

The choice of the theme was determined mostly by professional reasons. Working directly with this sector of population we understood that it is a socially vulnerable group, where economic and social dependency is too big, in terms of neighborhood networks: when or if they break, accommodation to the situation becomes an option; or there happens a devaluation of their role in society and their health, hygiene and nutrition conditions may get worse.

This work, called CasAnimada was intended to stimulate, entertain and advise the elderly who are in their homes, in order to minimize problems associated to this final stage of life (old age). **Stimulate** - learning throughout life, trying to keep the elderly in constant updating and in permanent contact with the community, activating active aging. **Entertain** - in the animation project we aim at making the elderly occupy their time in a more useful, dynamic and playful way. **Prevent** or reduce cases of isolation or social exclusion among the senior.

Taking into account these objectives, Santa Casa da Misericordia de Oliveira de Azeméis (SCMOAZ) intended to give voice to this project using animation as an intervention form for seventy elderly people, users of the social response of Home Support Services.

This article is divided into five items. Our first concern was to fit the elderly in the context of this work; we tried to draw a picture, taking into account the idea society has of the role played by the elderly. Then we had in mind to characterize briefly the Institution that allowed the development of this experiment. The family circle could not be considered in this article, since there are more and more elderly people living alone and without any respect from those around them. Next we approach the quality of life, articulating this concept with social health and aging features. Last but not least we intend to show our readers the project developed, by describing some of the implemented activities. We do not want to end this introduction without stating clear
that the project suffered a set of time constraints as it was held together with the performance of our own duties.

1. The challenge of being an elderly today

The aging of human beings is a phenomenon of the twentieth century. In its best known form it is characterized by a progressive increase in the number of elderly people and a progressive decrease in the youth rate (Fernandes, 1997).

This increase in the number of elderly people and the rate they represent in the global population goes hand in hand with a change of population stratification by ages.

So we can have an image of population aging by observing the age pyramid, a graphic representation which gives us a privileged global view not only of the composition of population by sex, but its structure by different age groups. In the analysis of the pyramid, we can highlight, according to Rosa (1993) that there is an evolution in the structure of the Portuguese population, that is, exists an increase in the advanced ages at the top of the pyramid and a decrease of the youngest at the base, causing that the pyramid seems a ballot box form.

Old age is a fact that should not be ignored in the societies of this century, deserving special attention and deep thought.

To Quintela (1995) the aging is a phase of life, difficult to define but easy to recognize.

According to Carvalho (2008), if we think in aging we understand that is a process different from person to person, depending on the characteristics of each one taking into account the environment in which it is inserted. These features may have related to sex, race, habits, tastes and customs, among others.

This is an irreversible process to which societies have to adapt today. This happens because when an individual grows old he is given a secondary place, being cut his/her ability to interfere and participate in society as he/she is far away from productive activity. The elderly are retired and replaced by young people, which implies a more or less direct loss of social relationships and the decline of the previous social status. Giving up working life means in many cases a sudden situation of a diminishing income, and for those already living with difficulties, a fall in a situation of poverty. That is, if old age usually evokes the idea of free time and rest, reality may be quite different. It is increasing the contrast between the few that hold the power and the great mass of inactive older people, endowed with modest means and under-paid.

One has to associate old age with a breakdown of communication with others, characterized by isolation and therefore loneliness, and which will worsen in time, with family separation or death of a spouse, for example. All this can get worse by the absence, in some cases, of adequate housing, economic conditions and health care.
Chronologically and by consensus among scholars engaged in this issue, being sixty five years old marks the beginning of the aging process.

The author Maria João Quintela (1995, p.21) tell us that when we talk about aging we shouldn’t forget that there are genetic, biological, physical, psychological, sociological, economic and demographic factors that are interrelated and should be considered throughout this process.

The human being does not get old at once, but gradually, in such a way that old age seems to settle down without being noticed. It is a process that is not fully understood, although there are several theories trying to explain the aging process.

This is however a normal process and not a sign of illness.

Psychologically old age starts when an individual begins to look back into the past with nostalgia and at the same time to face the future with some apprehension and insecurity, because the elderly are often victims of discrimination, stereotypes and negative attitudes from society. Older people feel a stigma and because of their sensitive nature are vulnerable to opinions, identifying themselves with a degrading image which is imposed to them by society.

With the undeniable quantitative dimension of aging, there is a relationship of cause and effect between population aging and the social dysfunctions that will take place, because the elderly class inflicts a great burden upon society.

This burden is identified in economical terms with the social rights in contemporary societies, such as the Portuguese, which include financial benefits for the elderly, such as retirement pension.

In this context, the social costs arising from the increasing number of elderly people, resulting from an aging population is increasingly high, as all citizens are entitled to Social Security and the generalization of pensions means a continuous increase in social expenses.

Given this context, the aging population may have undesirable consequences for the national economy and be a reason for poor welfare, even leading to potential conflicts between generations since an increase in social spending to guarantee pensions for the old age must be supported by younger generations.

With an aging population, this balance is compromised.

As we have seen, being increased longevity a reality, it is necessary and urgent to give these years’ quality and dignity, that is, life. It is urgently needed to create, organize and perform social responses for all elderly people, in order to provide them the reasons to live participating.

The challenge of the future should be to give substance to aging, so that it is not a time to wait, but instead more time to go on living, communicating and remembering.
The meaning of a policy of old age will therefore be to face the challenges, assuming them not only as social, economic and cultural rights but especially to create conditions to exercise affection.

2. Characterization of Santa Casa da Misericórdia de Oliveira de Azeméis


This is a building hundred eighteen years old. Initially more focused on health, it quickly expanded its scope to the care and support for the elderly, as well as children. Until 1999 and given its limitations in terms of physical space and the few existing human resources, Santa Casa da Misericordia only focused its activity in these two fields. Due to increasing waiting lists of seniors and the pressure felt by the lack of space and resources, a new house was built from scratch, moving from the former Lar Cesar Pinho to the present Lar da Misericordia. All prior gaps were filled with the constitution of a technical team within the social service and health, which allowed Misericordia to extend its scope to the local community.

Santa Casa da Misericordia is devoted to supporting those who have more difficulties at a professional, social, personal or economic level. Today, this institution has the following social responses: Home for the Elderly, Day Center, Home Care, Residential Social Response, Nursery, Kindergarten, Vocational Training, Community Center – “Ser Familia (Being a Family)” and Direct Intervention Team - “Soltar Amarras (Drop Shackles)”.

The social response Home Support Service (HSS) made this intervention possible and it aims at providing individual and personal care at home for the elderly, adults or families when, for reasons of illness, disability or other difficulties they cannot ensure temporary or permanent satisfaction of their basic needs and / or activities of daily living. This set of services is provided at the usual home of the user in order to promote autonomy as well as to avoid situations of dependency or their worsening. This response is developed both by day and night.

Being included in a policy of measures for the population in a situation of dependency, the Social Response of Home Support Service aims at offering a wide range of services, which corresponds to the effective fulfillment of rights of citizenship.

1. The specific objectives of HSS (Home Support Service) are:
   a) to ensure individuals and families various forms of satisfaction of their basic needs;
   b) to contribute to a delay or even avoid the institutionalization of individuals;
c) to provide physical care and psychosocial support to individuals and families in order to contribute to their balance and well-being;

d) to contribute to the improvement of quality of life in patients and families.

This institution aims at leading its work in the community to create living conditions that generate individual and collective initiatives that may ensure the independence, integration and social involvement of disadvantaged groups, as well as avoiding social exclusion more incisive in the borough of Oliveira de Azeméis and the neighboring area, privileging the institutional relations of "social partnership" with public or private organizations at both regional and national levels so as to be sure the responses to the situation / problem are global, both in terms of services and actions.

3. The elderly inside the family

In modern and industrialized societies, the tacit pact between the generations does not disappear, but suffers a significant process of depersonalization.

The elderly not only stops being the leader of the family as well as of social and economic life. He/ she starts facing problems in the family, with social relationships, housing and occupation.

The reduction of his/her household, its dispersion and sometimes the inexistence of a family, lead the elderly to serious situations of isolation.

Old age does not necessarily have to be a time of resignation, submission and isolation. We all need to feel useful, which does not only mean to be productive people.

Old age can be prepared and creativity does not have an age; it is necessary not to deprive but to privilege every moment and possible occasion of communication to express, to take the initiative and to create.

According to Ribeiro (1995) the family is very important in any society. This is a place of encounter, dialogue, learn to love and to be solidarity between generations.

The family is a meeting place to communicate, to learn to love and to develop solidarity between generations.

The deep socio-economic, cultural, political changes that have taken place both in Europe and other continents had a strong impact in the life of the families, bringing everyone serious economic, social and ethical problems.

However, the family is indispensable in the material, affective and moral support (Ibidem).
Then the family as an institution has to get prior attention both from governments and from national organizations.

Nevertheless, the family and community networks, through which informal bonds of solidarity (family, neighbors and friends) were established and communicated in a horizontal way, have shown a tendency to make way for formal solidarity (supportive institutions). Among the personal relationships (individuals/individual, individual/family or individual/community) the relations individual/state tend to take advantage.

The low fertility rates have led to a reduction of the family size which will affect the care that the child will provide to parents. The reduction of day care has to do with the increasing emancipation of the woman (daughter) and her increasing participation in active life, which makes her less available to give assistance to older relatives.

The nuclear family is different from the extensive one as it has given up some of its functions, such as children’s education, prevention and treatment of diseases, being these under the responsibility of the State or other institutions working side by side with the family. This cannot satisfy the needs of its members, namely elderly people, who have physical needs (feeding, housing and health care), who want psychic care (self-esteem, affection, balance), who need social care (identification, relation, communication and integration in a group).

For all these reasons the nuclear family is in some way unable to ensure a peaceful old age far from professional constraints and away from their own pace of life, since both members of the couple are usually linked to an active life dependent on job responsibilities.

In a civilization in which the birth rate is decreasing, life expectancy increases and the family situation changes. It is therefore appropriate to reflect upon the situation of elderly people in society nowadays.

The profound changes of modern society and their impact on European and international contexts where economy is a top priority make it necessary to pay specific attention to the effect that these phenomena cause in the elderly.

The challenge of the future will be to recover the role of the elderly within the family and within the community. Therefore the biggest challenge is focused on strengthening the solidarity bonds inside the families.

To avoid adverse effects that aging can cause consists in the human ability to adapt to new situations. The social services should ensure the necessary means for the individual to keep his/her independence as long as possible and have a decent standard of living, facing that fact as a right rather than a favor. They cannot be labeled as elderly and be attributed all the same condition. Different situations require different actions; worldwide models cannot be used.

It is necessary to stimulate the family to be aware of their responsibility towards the elderly, to recognize the important role that the elderly have in social and family cohesion. The
interaction and dialogue between generations are one of the most pleasant ways to minimize all the stress and anguish of the society we live in.

Old age must be prepared and creativity has no age; it is necessary not to deprive but to privilege every possible moment and occasion to communicate, express, take initiatives and create. It is necessary to look at oneself with different eyes.

4. Quality of life

Talking about quality of life is not an easy task; there is a variety of perspectives and ideas associated to this concept, such as cultural, social, emotional, economic and psychological among others. However if one asks several different people an immediate question about their meaning of quality of life, one gets answers like "being healthy", "being well with myself and others";" having what I want" or " achieving my objectives ". This way one can conclude that the criteria to characterize quality of life depend on whoever defines them, and so become very personal.

However, taking into account that we are focusing on an article aimed at a project showing the promotion of senior quality of life, we must try to portray the scope of the concept and not just a commonsense view.

The concept of quality of life goes hand in hand with the life cycle of a human being, thus with the natural and biological process of aging. From the moment we are born until we die we are always wishing (verb that gives a true meaning to our lives); as we are unhappy beings, we try to develop strategies to achieve our objectives and consequently to feel good, to feel that we have quality of life. We should therefore emphasize that the quality of life is linked to a continuous process towards fulfillment, which any individual undergoes daily, both at personal, social, professional and cultural level.

Here’s what Zimmerman (2000) tells us that over the life we experience different stimuli. When we are children we are encouraged to learn, to talk, to walk, etc. In adolescence we want to be adults and we are encouraged by the acquisition of a prosperous future. Reaching adult life we think in the family, in the profession and to solve problems. In the old age we find that despite not having a long life ahead, we must remember to live life intensely showing all that pass through this phase, which cannot be lived as a drama.

As the author tells us, the elderly at this stage of life should look at life as if these were their last days, that is, to live them intensely, testing and sharing their skills and competences acquired in a lifetime. Simões (2006) tell us that in all ages (life stages) is a duty to be happy, it is the duty of each one.

We can also relate the concept of quality of life to health. And in this sense we should have a look at the concept of WHO, so much focused on articles, theses and dissertations in social and human sciences. Being healthy is to feel good mentally, physically,
socially and not merely the absence of a disease (OMS, 1993). Thus, health should therefore cover feeling well at emotional, relational and even spiritual levels (Oliveira, 2004).

From what is written above we may conclude that, taking into account the well-being of the whole human being, one can achieve quality of life. We can also consider this concept of health and build the following diagram:

**Diagram 1 - The dimensions that involve the concept of quality of life**

The diagram represents the areas that we consider most important to define the concept of quality of life: physical well-being, in the case of the elderly, means going on with his/her activities of daily living and paying attention to his/her health; emotional well-being means the elderly should go on taking care of himself/herself and his/her image, to improve his/her self-esteem, that is, feeling good about himself, for the person he is; family balance is important too so that the elderly feels that he is still useful to his family, so he must continue to play a role within it; although the elderly have stopped working, it is important to maintain their contacts with the labor world, especially because they can be useful in solving problems due to their experience; balance in community relations, that is, every human being is part of a community, characterized by habits, beliefs and traditions that make up an entire culture, so the elderly should continue to have an active presence in the initiatives of their environment collaborating whenever necessary.

We believe that if we could reach the five dimensions focused above, we would achieve quality of life and simultaneously an active aging. However this task is far from easy. Fortunately there have been more and more professionals and investigation committed to this area.
Due to a progressive increase in aging, and taking into account several future projections, services for this age group are increasing. As referred Simões (2006), the progressive development and growth of resources to the level of social welfare institutions, hospitals, treatments in the nutrition area, has allowed the elderly to look at this step with a different attitude, with confidence, taking advantage of the positive aspects arising, for example, more time to walk, to learn and to cognize.

The contribution of education to which the author refers is a Lifelong Education. By highlighting the skills that the elderly has acquired and working them in order to achieve and / or reinforce new knowledge, one can promote continuous learning, as Ribeiro-Dias (2009) says that all of us experience the process of education throughout life, taking into account each stage of development, but it is still an continuous process.

As focused earlier, there are services, including Home Support Service, that have a major concern in helping the elderly to achieve quality of life. What often happens when working with older people is that we, professionals, have to encourage this learning and Zimmerman (2000, p.133) tells us exactly this: the best way to motivate an elderly, making it feel good in your family as well as in society to which it belongs is stimulating.

5. Intervention Project

5.1. Methodology

As we have mentioned throughout this paper, loneliness / exclusion by the elderly happens as a result of the way our society looks at the role played by the elderly as a group stripped of power and capacities. This position appears in every socio-cultural context and establishes itself through cognitive, social and institutional behavior.

The methodology used consisted in a series of tools, aimed at the development of relations of equality, sociability, based on responsibility, respect and intolerance against these behaviors.

When developing our practice of research this way, we are adopting an epistemological attitude which involves the decision to recognize value and heuristic capacities in the knowledge and capabilities of the social actors involved in the situation to study.

In carrying out this investigation and because it involves human beings, we had in mind, all the ethical aspects as protectors of the rights of the individuals involved in the research.

5.2. A CasAnimada

The project CasAnimada was created in order to focus its intervention in the active aging of older people, users of the Home Support Service. This was developed taking into
account the motto: *stimulate, entertain* and *prevent*. Thus it intended to develop the following specific objectives:

- Recognize the importance of animation / occupation in the Third Age
- Promote discovery and new learning
- Realize the importance of education / training / a lifelong learning
- Promote and provide a more harmonious and dynamic life
- Acknowledge the importance of skills, competences and know-how of the elderly, thereby promoting their self-esteem and self-confidence, reinforcing in some cases even their autonomy
- Motivate, understand and develop in the elderly a more constructive attitude, a positive spirit
- Provide a more harmonious life, attractive and dynamic participation and involvement of the elderly
- Encourage the elderly to develop leisure activities and hobbies
- Allow the elderly to develop a more active and less passive leisure
- Encourage fine motricity
- Develop the memory of the elderly

The project was developed/ undertaken in twelve months, and its outcome happened in June 2011. The activities at home had a monthly schedule, with weekly visits to six elderly. The activities were developed and adapted to the physical, intellectual and motor skills of every elderly, aiming at areas like:

- Artistic and cultural expression;
- Reading (analysis, development of critical thinking and cultural information);
- Senior games;
- Exchange of knowledge and experiences;
- Viewing of films and documentaries, among others.

For its performance we had the collaboration of social workers responsible for Home Support Service and a Technician for the Education of Adults.

**5.3. Characterization of the target group**

Home Support Service covered eighty users last year; however this initiative was tested in twenty four users only, from thirty to ninety six years old, eighteen females and six males.
Table 1 - Degree of dependence of users on the project covered

<table>
<thead>
<tr>
<th>Degree of dependence</th>
<th>Autonomous</th>
<th>Semi-Autonomous</th>
<th>Totally dependent</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of users</td>
<td>10</td>
<td>8</td>
<td>6</td>
<td>24</td>
</tr>
</tbody>
</table>

One should make clear from the analysis of the table below that our clients are mostly autonomous and semi-autonomous (ten and eight, respectively), but for various reasons such as insecurity, fear or lack of physical abilities remain at home, never ever leaving it. It is also important to refer that six of them are totally dependent, that is, they require a third party to ensure their basic needs. However, these were the chosen ones because the psychological evaluation done to all users showed that these needed to be busy in order to feel happier and better adapted to their situation.

Conclusion

The phenomenon of social exclusion primarily affects individuals that society deems to be useless / ineffective, i.e., those that are not part of the active population, that is, the elderly, and thus find themselves outside the opportunities opened to the others in the various fields of social, economic, cultural and family structure.

Nowadays, only a few families are available to supervise the aging process of their relatives, for several factors that emerged in our society.

Our intervention made us understand that the concept of "social exclusion" leads to exclusion from citizenship, a situation that is increasing among the elderly and which implies that the individual has access to basic social systems that can be grouped into five areas: social, economic, institutional, territorial and symbolic references. This not only leads to the exclusion of the elderly as well as to their loneliness.

According to Barroso (2006) most elderly people resist the idea of leaving their home, but in spite of staying in their housing environment they are victims of isolation and loneliness; it often happens that in their own environment they feel even more alone.

It is noteworthy that the objectives and proposed activities were carried out successfully, because coming into the space of the elderly was not difficult for the professionals, since these were usual faces.

However, it was not a bed of roses, since the elderly have their routines and daily habits, many of them deeply rooted, making it difficult to carry out the activities in the initial phase.
The elderly showed some resistance to a change of schedules, revealed lack of patience and concentration and also an urge to communicate many issues important in their life, making the performance of the activities often difficult. However, in time, these difficulties decreased, once they aroused capacities already forgotten, and others never learnt or experienced.

One of the constraints felt was due to lack of economic support from our government, thus limiting the coverage of this activity.

As a final note, it should be said that this work was personally and professionally very rewarding, as it was a deep plunge into animation in the home context.

References


Websites

Social work and violence against the elderly.
How to promote the right of the elderly to lead a dignified life?

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Abstract

Usually the notion of violence on the elderly is assumed to be as the one defined by WHO (2002a: 126) and also by the European Commission (2008: 2): "a single or repeated act or lack of appropriate action, which occurs in the context of any relationship, where there is an expectation of trust which causes harm or stress to an elderly person." The Toronto statement (WHO, 2002b) assume several categories or kinds of violence: physical, psychological, emotional, sexual, financial and neglect considering that they can be intentional or unintentional.

The violence on the elderly has several typologies (UN, 2004). These can be: self-violence that includes self-abuse and suicidal behavior, interpersonal violence that integrates family life and community and finally the communal violence which includes the social, political and economic. Among these typologies we highlight the inter-personal relation to violence between individuals, within and outside the family, including strangers to the victim. As we know this kind of violence is the most common but now with the increasing number of elderly people in institutions can also come to question who protects the elderly in these contexts.

International agencies have recommended that countries need to be aware of this problem and create legislation compatible (integrated domestic and institutional violence) and training. In this way, the question is - how can social action and social work promote the rights of elderly and improve their daily lives whether at home or in institutions and also in society itself?

This communication attended to demonstrate the evolution of the legal protection against the elderly as well as the activities to promote non-violence and support victims and aggressors and also the social workers signification about this subject.

Keywords: social work, elderly, violence, rights.
Introduction

The Portuguese Constitution considers the rights, freedoms and personal guarantees as well as the dignity of the human being as basic principles. These are displayed in the power for self-determination – autonomy, participation and choice. Within this scope Social Work is understood as a social practice that develops in society with a relative autonomy of criteria and consequent social responsibility. This communication relates Social Work and violence against the elderly, reflecting on how Social Work can promote the rights and the dignity of the elderly with whom it interacts. It considers the perception that the professionals who carry out this activity with social equipments and in health care services have of violence against the elderly.

Firstly, we are going to identify the concepts of violence against the elderly as defined by international organisations (WHO, EU) and by some research carried out in this field. We will present the known categories of violence and risk indicators. Within this line of analysis we consider the signs that we should pay attention to when approaching situations of violence against the elderly. We present some statistical data on the phenomenon in Portugal and some guidelines for policies in this area.

Secondly, we present the result of an inquiry instrument applied to social work professionals. The objective of this instrument was to assess the perception of categories about the risk of violence against the elderly. The instrument was granted by the European network Prevent Elder Abuse, which authorised its translation and adaptation to the Portuguese reality. E-mail was used to send the interview to twelve professionals that develop activities with elderly people and/or are in charge of social and healthcare responses in this field. Of the twelve interviews sent we received four answers – two from professionals that develop their activity in the social work sector of central hospitals in the city of Lisbon, and two from professionals who are in charge of social equipments for the elder in the form of old-age homes.

The interview aimed at approaching various issues linked to the meanings attributed to elder abuse in our country; whether abuse is acknowledged in society and in what way; whether abuse can be considered intentional or non-intentional; who are the abused elderly (the ones at home or the ones that are in institutions); who is the victim and who is the perpetrator of abuse; existing legislation, as well as the numbers of violence against the elderly; risk factors and how these are typified; and who are the institutional responsible when one talks about elder abuse. The result of the analysis of these interviews shall be presented at the end of the text.

1. Questioning the notion of violence

Violence and elder abuse, alongside violence against women and child abuse, have gained expression and visibility with the increase in the number of people aged 65 or more in the total population of developed countries. Violence and elder abuse are not current phenomena. Violence has always existed, especially amongst socially more fragile and vulnerable groups. Up
to the 20th century violence was understood as something natural and with few or no public expression. The issue gains visibility in the after-war period with the Declaration of the Rights of Man and of the Citizen, the Declaration of the Rights of the Child and, later on, in the sixties with the claim for women’s rights. It was within this context that the first surveys on this issue emerged: In the beginning it was identified as a social problem and a problem of the age, but later it was assumed as a public health problem and a criminal justice problem (WHO, 2002: 125), and currently it is seen as a matter of human rights.

In democratic societies human rights are basic rights in the functioning of states, and civil, political and social rights are part of the citizen’s daily lives. Despite that, they are constantly infringed, and abuse and violence prevail over groups considered more fragile such as women, children and the elderly. These groups are frequently associated with poverty and exclusion (Capucha, 2005). The increase in these phenomena has led international organizations to disseminate guidelines to conceptualize and act upon this problem (WHO, 2002a and European Commission, 2008).

Already in 1992 the European Council defined abuse as “a non-accidental action or omission that harms life, and the physical and psychological integrity of an elder or harms the development of their personality, causing damage and compromising their financial security". The damage caused by omission gains pertinence in these two last definitions and places violence as an individual and paralegal issue. In legal terms the act of involuntary or intentional violence and abuse against the elderly always represents omission.

Usually the assumed notion of violence against the elderly is the one defined by the WHO (2002a: 126) as well as by the European Commission (2008: 2): “a single or repeated act, or the absence of appropriate action, that occurs in the context of any relationship in which there is an expectation of trust which causes damage or tension to an elder”. In the Declaration of Toronto (WHO, 2002b) the notion integrates the categories of physical, psychological, emotional, sexual, financial abuse and negligence, and it is considered that this one can be intentional or involuntary. This way violence has become a social and health issue.

Authors such as Minayo (2003) propose a broader vision of the notion of violence against the elderly in social terms: “a concept regarding processes, interpersonal, group, class, gender social relations, or materialized in institutions when these use different ways, methods and means to annihilate the other, or to coerce them directly or indirectly by causing them physical, mental and moral damage.” (op. cit.: 785)

But violence against the elderly cannot be conceived as an action. It is more than individual, more than the social and health issue, it is a matter of power and human rights. Faleiros (2007) explains this complexity by considering it “a complex and diverse relational process. It is relational because it should be understood within the structuring of society itself and interpersonal, institutional and family relations (...), it is complex because it involves power relations both in the broader social context and in private relations in a historic and dynamic
perspective (…), and it is diversified in family, individual and collective demonstrations (…) amongst the various groups and segments, and it reaches the physical body and the psyche” (Faleiros, 2007: 27).

This way the author interprets violence against the elderly as an “unequal power relationship implying the denial of the other, of the difference, of tolerance and of opportunities. As a consequence it results in harm, damage, or suffering and infringes the social pact of sociability, of guarantee of rights and of civilization based on human rights” (Faleiros, 2007: 30). It furthermore translates material, moral and identity damage for those who suffer it and remain in disadvantage before society’s structure.

This notion of violence is also defended by Strümpel and Hackl (2008: 10) who propose to integrate violence into a structural, cultural and personal dimension. In structural terms, violence refers to the influence of laws, way of life in poverty and circumstances of the environment. In cultural terms, violence refers to the importance of religious values, ideologies, negative pictures of old age. In personal terms, it refers to motivation, self-esteem, biographical and life path aspects.

Strümpel and Hackl (2008) have coordinated a European survey on representations of the notion of violence in several countries and came to the conclusion that definitions have distinct characteristics resulting precisely from those aspects. It was therefore possible to distinguish in some countries that violence is associated to physical aspects and that abuse and ill-treatment are associated to negligence and emotional abuse. Apart from these distinctions, similar characteristics were identified, with highlight to the indiscriminate use of the notions of violence, abuse, and ill-treatment as though they were one and the same thing, Hence our approach to the notion of violence here as well.

2. The categories of violence

Violence and abuse can be practiced at three levels: self-inflicted (suicide, self-abuse), interpersonal (family and community), and collective (social, political and economic) (WHO, 2004). The most frequent one is interpersonal violence and abuse, practiced by relatives or by institution employees where the elderly live and/or which they relate to and that provide, or not, care. It can also be practiced by strangers or known people from the community. Usually, violence against the elderly is divided into the following categories: physical abuse; psychological and emotional abuse; financial or material abuse; sexual abuse; negligence and self-negligence (WHO, 2002: 126-127; Strümpel and Hackl 2008: 17).

Physical abuse is a way of inflicting pain or injury, physical coercion or domination induced by force or by undue use of medication, as well as physical brutality. Psychological and emotional abuse is a way of inflicting mental anguish, insult, insulting words, intimidation, false accusations, defamation, psychological suffering, mental cruelty and moral harassment. Financial
or material abuse regards illegal or improper exploitation, or the use of the elder’s financial funds or material resources. This notion also includes extortion and pension money control, misappropriation of assets and exploitation of the elderly through, for example, coercion to begging.

Sexual abuse implies non-consensual sexual contact of any kind with the elder, including incest, indecent assault and other forms of sexual coercion. Negligence involves the refusal or non-performance of the obligation to take care of the elder, refusal of affection, lack of interest for the elder’s well being, and abandonment. Finally, self-negligence implies the behaviour in which the elder puts his/her own safety and health at risk.

There are still other categories of violence, the ones related to institutions. Violence can be inflicted in social and healthcare institutions with responsibility in the protection, promotion and care for the elderly and has specific characteristics arising both from the lack of functioning and from abusive behaviour of employees. However, one and the other occur together and do not happen without each other. The following causes are identified: the kind of assistance provided in healthcare and social institutions; staff stress; difficulty of interaction between residents and the elderly; internal environment; organizational policies (WHO, 2002:133).

When we speak about the kind of assistance provided in healthcare and social institutions we are talking about deficit of assistance, inadequate food, deficient nursing services and lack of basic and specialized care. Staff stress results from precarious work conditions, insufficient training and psychological problems. Difficulty of interaction between residents and the staff refers to bad communication, resident aggressiveness and cultural differences. Treatment of the elder with disrespect for his/her dignity, as well as the phenomenon of bullying, can be identified as violence. As for the internal environment of institutions, it includes lack of privacy, the use of repression, inadequate sensorial stimulus and propensity for accidents to occur inside the institution. Organizational policies refer to abuse of power against the elder and non-participation of the elderly in the decisions concerning them, as well as authoritarian and bureaucratic attitudes and the use of repression, theft and fraud. Lack of counselling and information to residents and relatives, and the reduction or high rotation of staff are also typical of these categories of violence.

Let us now look at other risk indicators that allow us to understand and identify the phenomenon of violence against the elderly.

3. **Risk indicators of violence against the elderly**

Many old people are well cared for and treated, whether they live with relatives or in institutions where dedicated caregivers provide a quality service. Despite that, there is still a group that suffers violence and abuse. According to the European Commission (2008) these people present a greater risk because they are fragile. They are the following: i) chronic patients, old
people with physical, sensorial and intellectual problems, disabled people, sick people who depend on others to provide them care and who lost their autonomy both in their daily-life activities and in decision-making and choosing; ii) individuals with mental problems (such as mental disease, dementia, communication difficulties); iii) people in social situations of risk (isolation, loneliness, poverty, lack of community support, cultural barriers in the case of immigrant elderly); iv) people who are victims of certain social situations such as those who have insufficient resources in terms of the welfare system, policies that are not favourable to the autonomy of the old person and of the caregiver relative, or inexistence of intergenerational solidarity).

The report on violence coordinated by Strümpel and Hackl (2008) identifies indicators that some countries use to assess the level of risk. The authors present the case of Italy (Carreta, 2002, quoted by Strümpel and Hackl 2008: 38) which presents some indicators to identify abuse and negligence against the elderly – Table 1.

### Table 1 – Risk indicators of violence against the elderly

<table>
<thead>
<tr>
<th>Categories of violence</th>
<th>Risk indicators of violence</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Negligence</strong></td>
<td></td>
<td><strong>Abuse</strong></td>
</tr>
<tr>
<td>Physical</td>
<td>Signs of malnutrition (loss of weight, asthenia, sleepiness), signs of dehydration, lack of hygiene (dirty clothes, damaged teeth, dirty finger and toe nails, dirty bed sheets), scabs, diarrhoea, overdose of medication, muscle contraction due to insufficient physical activity.</td>
<td>Scratches, bites, contusions, burnings, bone fractures, lack of glasses, partial prosthesis and hearing aids (which are retained by the perpetrator), black eyes or broken teeth, torn hair, face, neck, chest wounds, outdated medical treatments, cancellation of doctor’s appointments and medical exams, refusal to get undressed (for medical exams or to take a bath) and refusal to expose the violated body.</td>
</tr>
<tr>
<td>Psychological</td>
<td>Lack of participation in the decision-making process, social isolation, low self-esteem, nervousness, loneliness.</td>
<td>Insomnia, changes in appetite, sadness evolving to depression, paranoia, fear of unknown people, confusion and lack of orientation, anxiety, apathy.</td>
</tr>
<tr>
<td>Economic</td>
<td>Scarcity of food at home, lack of prescribed medication, accumulation of bills and non-cashed cheques.</td>
<td>Sudden impossibility to pay bills, incompatibility between economic capacity and living conditions, sudden reduction in a bank account, cheques signed by unauthorized people.</td>
</tr>
<tr>
<td>Environment</td>
<td>Lack of attention from community institutions with respect to the elder’s risk situation, lack of access and inappropriateness of social and healthcare resources.</td>
<td>Lack of electricity, heating or running water, presence of expired and non-identifiable or frequently prescribed medication, lack of minimum hygiene conditions.</td>
</tr>
</tbody>
</table>


This reference table – Table I – is useful for professionals that work with the elderly in social institutions or at home. For professionals who work at home it is important to understand
that violence within the family increases on the one hand when the elderly are very dependent and on the other hand when family caregivers suffer from stress resulting from the task of giving care. Especially when one knows that most family caregivers are women, usually wives or daughters, and that many of them also keep a full-time job apart from the task of caring for the father or mother that is dependent.

In the case of professionals who develop their activity in residential structures, old-age homes and healthcare services, it is necessary that they understand that risk increases when organizations are very closed and bureaucratic and when those responsible rationalize activities and restrict the freedom of residents. It is also necessary to understand that the community/environment is more and more discriminatory and aggressive with the elderly, namely in respect of participation, protection and valuing of this group in society.

4. The situation in Portugal

In Portugal there is no plan or specific law for the area of violence against the elderly. This one is included in the National Plan against Domestic Violence and is currently framed by Law no. 112/2009. On the other hand, the existing statistical analysis reveals the actual numbers of violence and abuse against the elderly in our country. Despite that, we can provide some data presented by APAV – the Portuguese Association of Support to the Victim, an entity which, together with the police, has the responsibility of following up these processes in Portugal. In 2009, 7,639 crimes were indicated by this association (APAV, 2010: 8). The data concerns domestic violence in 90.3% of the cases, crimes against people and humanity in 7% of the cases, crimes against patrimony in 2.3% of the cases, crimes against life in society and the State in 0.2% of the cases, road crimes in 0.1% of the cases, and others such as drug trafficking in 0.2% of the cases. In most of these crimes (86%) victims are female. The age of these victims is between 26 and 45 years of age. 642 cases of people with 65 years of age or more were counted, corresponding to 8.4% of the total, and the majority is women (APAV, 2010: 8). These numbers mean an average of 2 crimes a day against the elderly.

In the global statistics of domestic violence in this report the author of crime is the spouse in 50.4% of the cases but also the former spouse in 9.2% of the cases, the father or mother in 9% of the cases, and the son or daughter in 7.5% of the cases. Most crimes, 59%, are committed in the joint residence and/or in the victim’s residence in 12% of the cases.

Lack of information in this area in Portugal makes a clear need to create a database that allows us to better understand this phenomenon in Portugal in its various components – categories of abuse, population group that is victim and group of abusers. This lack of appropriate knowledge requires urgent measures that define prevention strategies for the phenomenon, immediate intervention when violence occurs and support after violence has occurred.
Carreta (Carreta, 2002, quoted by Strümpel and Hackl 2008: 51) identifies a first level of prevention, with educational initiatives to raise the awareness of public opinion, organization of training programmes, publication of articles in magazines, newspapers and other publications, personal defence training, legal measures and direct assistance to relatives. On a second level, when the fact occurs, she suggests denunciation of abuse to the authorities, presentation of adequate documentation and presentation of penalizing measures for the offender. On a third level, the level of follow up, psychological support, psychotherapy and occupational therapy, support in daily life activities and in socialization activities, individual and family support, and assessment of the possibility of withdrawal of the elder from the family and/or institutional context are important.

Apart from these strategic actions, it is important to build a reference framework to assess violence situations and identify procedures when those situations occur. The focus is on how to act. Strümpel and Hackl (2008: 52) present some steps that should be taken into account. First, recognize the signs; second, study the situations, trust intuition, observe, examine and materialize the situation by placing the facts occurred; third, check the facts with the transgressor and the victim; fourth, make the facts known in the organization and involve the victim and the transgressor in the process; fifth, draw a report on occurred facts; sixth, develop a strategy and an intervention and follow-up plan both for the victim and the transgressor. The involvement of subjects in the actions should be carried out separately, as the actions are different for each. The purpose of the action with the victim is protection and promotion, whereas with the transgressor the purpose is prevention of situations and appropriate legal and judicial action.

5. Social work and violence against the elderly

As referred to in the introduction, we proceed to the analysis of the data gathered in the interview to assess the perception that social work professionals which develop activities for the elderly population have of abuse/ill-treatment/violence. We first present the analysis of the meanings of ill-treatment and abuse that professionals have identified in their work practice – Table 2.
Table 2 – Meanings of abuse/violence against the elderly

<table>
<thead>
<tr>
<th>Meanings</th>
<th>Contents</th>
<th>Answers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Violence as an action toward the elder that causes him/her damage (individual and social)</td>
<td>“The destructive behaviour addressed at the elder that occurs in the context of relationship that can produce damaging effects of physical, psychological, social or economic characteristics, resulting in suffering for the elder.”</td>
<td>E1</td>
</tr>
<tr>
<td></td>
<td>“Actions, attitudes that do not respect the dignity and freedom of the elder: moral, physical, mental damage or material losses.”</td>
<td>E2</td>
</tr>
<tr>
<td></td>
<td>“Abuse of the elder is a (single or repeated) action or omission that causes him/her damage or affliction and that is produced in any relationship where there is the expectation of trust.”</td>
<td>E3</td>
</tr>
<tr>
<td>Violence as violation of (collective) human rights</td>
<td>“Physical and/or psychological violence, including verbal and emotional violence. The cases of negligence, abandonment, extortion both by relatives or organizations where the elderly are included. Repeated violation of rights, especially in respect of the participation of the elderly as people with the right to self-determination and personal autonomy.”</td>
<td>E4</td>
</tr>
</tbody>
</table>

The meanings that professionals attribute to violence against the elderly are especially individual and social (E1, E2, E3) but also regarding human rights and citizenship (E4), although this last one has very little expression in comparison with the first one.

As for acknowledgement of the phenomenon in Portugal, some categories of abuse/violence are identified – Table 3 –, namely the ones referring to the inexistence of information, this fact implying their non recognition (E1), the legal acknowledgement included in the penal code and in the law on domestic violence – Law no. 112 (2009), (E2, E3) – and the acknowledgement only in certain circumstances, namely when indicators of physical violence, negligence and abandonment are detected (E4). In other circumstances it is harder to identify violence, especially when these circumstances are included in the practices of the professionals (E4).

Table 3 – Acknowledgement of the phenomenon in Portugal

<table>
<thead>
<tr>
<th>Type of acknowledgement</th>
<th>Contents</th>
<th>Answers</th>
</tr>
</thead>
<tbody>
<tr>
<td>No acknowledgement</td>
<td>“Inexistence of information regarding crimes according to age level.”</td>
<td>E1</td>
</tr>
<tr>
<td>Legal acknowledgement</td>
<td>“Yes but not enough. There is a legal framework in the Portuguese Penal Code, in the National Plan to fight domestic violence, etc., but sometimes there is too much media attention on situations of economic abuse (and others), which contributes to their increase. (...) if on the one hand there is denunciation and acknowledgement”</td>
<td></td>
</tr>
</tbody>
</table>
As for the entities that have contributed to the acknowledgement of violence against the elderly, the interviewees unanimously identify the media (E2, E3, E4), although they do acknowledge other entities: national network for support to the victim and non-governmental organizations that provide support to the victim (E2), Prosecuting Authority and some professionals (E3), as well as the Ombudsman [Provedor de Justiça] through the elder line (E4). As for the most frequent kind of abuse, professionals refer all kinds of existing ill-treatment and abuse (E2, E3, E4) or some such as “physical abuse, verbal abuse, emotional abuse, negligence and financial extortion” (E1).

In terms of signs or symptoms for detection of abuse of the elderly, physical, behavioural and emotional ill-treatment are referred. The physical signs are linked to another category of violence, i.e. emotional/psychological violence. Both (physical and emotional/psychological violence) produce changes of behaviour in the elder (E1, E2, E4) that can be both apathy as well as (passive or reactive) agitation (E3) – Table 4.
Table 4 – Main signs/symptoms in the detection of abuse/violence

<table>
<thead>
<tr>
<th>Signs and symptoms</th>
<th>Contents</th>
<th>Answers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical, emotional/psychological</td>
<td>“Besides physical symptoms, the elder feels fear, apathy and has difficulty in making decisions. He/she also has low self-esteem. Sometimes financial extortion is also common”</td>
<td>E1</td>
</tr>
<tr>
<td></td>
<td>“Physical signs, behavioural changes, isolation, difficulty in interacting with others, agitation, apathy, fear behaviours or postures, or refusal to assume the role of victim”</td>
<td>E2, E4</td>
</tr>
<tr>
<td>Behavioural</td>
<td>“Behavioural changes (when you know the victim) are probably the common indicator for all forms of abuse (...)”</td>
<td>E3</td>
</tr>
</tbody>
</table>

When we analyze this issue we consider that both intentional and non-intentional violence are abuse/ill-treatment/violence. That is also the concept that professionals believe in. For them “Although passive (non-intentional) abuse is different from the active (intentional) one, as it implies non-awareness and is non-intentional, it integrates similar actions and consequences” (E1, E2). Despite this, non-intentional abuse is identified and sometimes excused with the lack of preparation/training of professionals. One of the professionals that had identified some practices associated to violence against the elderly, such as the integration of the elder in an old-age home without his/her consent, considers that this is a non-intentional action. According to her, it is due to “a lack of preparation/ insufficient training from their part” (E4).

Violence against the elderly occurs in the context where they are integrated, at home or in healthcare or social institutions. The most frequent one is practiced at home, as the majority of people with 65 years of age or more reside at home. In Portugal the number of people with 65 years of age or more that are institutionalized in old-age-type homes is approximately 55,266 which corresponds to 3.39% of the total of old people in Portugal. Of these, 37.85% are 85 years of age or more (refer to Martin and Neves, 2007). One knows that most of them did not choose this kind of residence and that many are confronted with the situation when the decision is already made.

Although the professionals interviewed operate in healthcare and social institutions, they consider that violence occurs especially within the family, particularly when the elder “depends physically and emotionally on the caregiver” (E1). This abuse can be “financial, verbal and emotional abuse, abandonment” (E3, E4). As for institutional abuse, professionals identify both “the entry into the institution, often against the elder’s will (old-age home or day centre), and exaggerated medication, excess of institutional rules and attempting against the elder’s will and freedom, namely him/her not being able to go out in the street on his/her own will and not
having access to his/her personal belongings (pictures, clothes)“ (E2, E3, E4). Whereas violence at home is perpetrated by the family caregiver, in the institutional context violence acquires multiple contours, as it can result both from the institution’s own rules and regulations, be committed by employees, volunteers and relatives as well, be a result of abandonment, lack of affection and privation of financial assets, and others (E3, E4).

When this kind of relationship exists between the aggressor and the victim, professionals associate it with the family relation and not to a professional relation. They consider that in the family relation relatives, especially sons/daughters (E1, E2, E3, E4), but also “nephews/nieces” (E1), “grandchildren” (E2) and the “spouse “(E3).

As for knowledge of categories of violence against the elderly, professionals reveal they have a general knowledge of the themes. In respect of issues centred on legislation and legal framework about violence against the elderly there is no knowledge about these issues. Of those that answered, two are unaware of the existence of legislation in this area (E1, E3), one considers that there is no specific framework for abuse and violence in this area (E2) and, lastly, one identifies article 152 of the Penal Code (E4). In fact legislation in this area is framed in general crimes or in intentional omission: crime imputable to the one that commits the fact, or negligence when the fact is non-intentional, also punished by law (Penal Code and Law of Domestic Violence).

As for the numbers of violence against the elderly, one can see that those that develop a professional activity in the area of healthcare are the ones that better identify them, especially the statistics presented by APAV (2009). The others do not answer.

In terms of characteristics of the victims, professionals identify older people as “People of advanced age with some functional and/or cognitive limitation. Caregiver with low economic resources or economically dependent on the elder. Conflicting relationship between the elder and the caregiver” (E1, E4). Within these, violence is more frequent against women (E1), widows, and isolated old people (E2). These cases are more frequent in the institutions where professionals develop their activity, where there are mostly “women, widows, with low income, sick (generally with incapacity for daily life activities), alone and isolated” (E3). This profile is effectively the one at greater risk but it is also the one that, in the context of intervention, is privileged by the social services.

We wanted to know the theoretical analysis perspective present when professionals operate in these cases – Table 5. In this table we can identify three perspectives or illustrations. A macro vision that forwards toward the identification of long-reach theories, such as the ecosystem, to explain micro issues (E1, E2). An integrated vision that is simultaneously macro, meso and micro, and that identifies some modus operandi centred in the personal capacity of achievements and expectations of the elderly (E4). Finally, a third vision, more sceptical with respect to theoretical and intervention perspectives in this area, that reveals difficulty of understanding the behaviour of institutionalized elders by those who develop activities there and
refers the question to old people’s self-victimization. One can infer that this self-victimization of institutionalized elders translates a behaviour of resistance to internal aggressions (regulations of the institution, rigid rules and regulations, stress of professional caregivers, scarcity of personal care), as well as to external aggressions such as for example being interned against one’s own will.

As for the way intervention is typified, it is confined to the meanings enunciated from the start – Table 4, page 11. Thus, one of the professionals considers it an exclusively “social” problem (E1), another one a “social and family problem with impact in other areas” (E2) and also “a safety issue” (E4), explaining it as an individual/family and social problem. Apart from these conceptions, violence can be typified under multiple aspects that refer to “a social problem, a policy or human rights, a health problem, a safety issue and a family issue (…)” (E3).

<table>
<thead>
<tr>
<th>Perspectives</th>
<th>Contents</th>
<th>Answers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Macro vision of intervention</td>
<td>“Theory of social exchange, model of cross-generational violence and model of intervention in crisis”</td>
<td>E2</td>
</tr>
<tr>
<td></td>
<td>“Ecosystem vision that integrates psychiatric, psychological, social, cultural and environment aspects, and a holistic model that takes the same aspects into consideration. The problem should be seen as a request from a set of difficulties and not just as the person has expressed it. The forecast of steps to take should be based on a global international vision of the phenomena, looking for relational games”</td>
<td>E3</td>
</tr>
<tr>
<td>Integrated vision of the intervention at micro, meso and macro levels</td>
<td>“Reflexive-therapeutic vision whose basic idea on the nature of social work is centred on the individual, intending to promote change and the development of people, inserted in a humanist-based philosophy. The following are characteristics of this vision: personal capacity building through personal promotion and achievement; a better well being in society for individuals, groups and communities; interaction between the user and the social worker is the path to modify and create new ideas; personal empowerment – personal reflection on own feelings and way of life. Which means that we will be facing the psychosocial model, social advocacy and empowerment”</td>
<td>E4</td>
</tr>
<tr>
<td>Scepticism</td>
<td>“I leave it for the professionals and researchers that work on these issues, although it is quite clear that who debates and talks about these issues does not work directly with the elderly (...). And from the news, the statistics, the interviews one can obtain a great deal of knowledge (...) but always distanced from reality (...). For example, I had never heard the idea that sometimes the elderly themselves induce caregivers psychologically toward aggression in order to self-victimize and be able to accuse them (...).”</td>
<td>E1</td>
</tr>
</tbody>
</table>

Finally we wanted to know whether professionals have a notion of one or more entities responsible for prevention, protection and social integration of elder victims of violence in our
country. This knowledge is very important in intervention, as it is with it that one can infer whether professionals intervene and forward the situations that they diagnose in their professional activity. We verified that only healthcare professionals have answered, which allows us to infer that these are the most apt to intervene in this area. And despite regional and cultural differences that influence intervention in this area, one of the interviewees considers that the State has a fundamental role in this.

“The State has the responsibility to define, in preschool education syllabus objectives and guidelines for the basic and secondary levels of education, the guiding principles of a domestic violence crime prevention programme. The State ensures the promotion of domestic violence prevention policies, foreseen in article 78 of the Diário da República [government gazette] 1st series no. 180 – 16 September 2009. By creating guides and educational products in schools that include themes such as education for gender equity; by creating educational informational materials for student population, and carrying out awareness raising actions in schools. As well as with national awareness raising campaigns on the theme” (E2).

However, the State on its own is not capable of ensuring that elder victims of violence are dignified. State institutions, therefore, have to associate with civil society (private profitable and non-profitable institutions) and to the professionals that develop activity in this area.

“Education facility; municipalities that have or wish to have projects against violence, professional boards in the area of healthcare, public administration entities responsible for the area of citizenship and non-governmental organizations, aiming at articulating procedures regarding protection and assistance to the victim” (E2).

It is indispensable to create guidelines for intervention together with this network. Training gains importance in the speech of professionals, and the development of programmes for “specific training in the area of domestic violence to several professionals, to professional teachers in the areas of health and law, to crime police and legal medicine technicians” is important, as shown by article 79 of the Diário da República [government gazette], 1st series, no. 180, of 16 September 2009. Hence the importance of operating in network and the importance of training in this area so that the prevention of elder abuse becomes a reality in our country.
Conclusion

Violence against the elderly has been the object of analysis but in Portugal the phenomenon is not yet known deeply. In this exploratory study we wanted to know what the meanings of violence against the elderly were for professionals that carry out their activity in social and healthcare institutions, in order to understand the way these professionals can promote the dignity of old people.

Considering the number of professionals that answered the inquiry instrument, we cannot come to many conclusions but we can conclude that they still have a certain difficulty in materializing these issues, maybe because these issues are not given the greatest importance by the professional himself/herself. The ones that answered refer the meanings of violence against the elderly to personal and social problems, as well as to issues of citizen’s rights, although the first ones are more frequent than the second ones.

We can infer that professionals can identify indicators of violence against the elderly, especially if these are explicit: physical violence, negligence and abandonment. They consider that family is the main source of this phenomenon but they also know that, when institutionalized, older people may suffer double violence: the one that occurs both in the institution and in the family. We therefore deduct that it is the institutionalized people that may suffer a greater risk of violence. Some European countries have developed not only legal mechanisms for prevention and intervention on domestic violence but also legal mechanisms for prevention and intervention on institutional violence (refer to Bavel, et al. 2010). In this issue, which refers to the legal framework, it is the responsibility of the State and society to create protection legislation for violence against the elderly.

The inexistence of a legal framework results in each professional, at intervention level, mobilizing his/her knowledge to operate in this area. Professionals consider important to develop specific training that allows for identifying risk indicators, diagnosing, forwarding and protecting victims, and following up on transgressors.

In this context the European Commission (2008) considers that member states should develop prevention measures for violence and abuse of the elderly, namely: creating a global information gathering system or database, capable of making the prevalence and incidence of these phenomena clear for each country; developing systems to report and denounce cases of violence against the elderly; drawing specific legislation in this area; establishing and perfecting specific services for old people that have been victims of this type of situation, namely self-help groups, support phone lines and specialized support services.

It is also necessary to create educational programmes and prevention campaigns for the public in general to be able to identify signs of abuse and denounce the situations, to train other healthcare and social professionals with responsibilities in the protection of older people and to introduce guidelines that allow for procedures to be homogenized, for home-based care.
programmes that improve the procedures of the informal caregivers to be developed, for the establishment of quality monitoring and evaluation systems of the care provided to the elderly, especially long-term ones. These are the recommendations one expects to see recognized in favour of the elderly that suffer from violence.

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APAV (2010). Estatísticas APAV 2009, APAV.


Despacho n.º 7837, de 2002; Despacho Normativo n.º 12, de 1998.


Law no. 112 (2009) of 16 September. Law that establishes the legal regime applicable to prevention of domestic violence, and protection and assistance to its victims.


Endnotes

· Applied in various European countries with the purpose of understanding what their position is in respect of elder abuse. The application of this questionnaire in the European context resulted in the report “Elder abuse in Europe, Background and Position Paper”, drawn by Maria Van Bavel, Kristin Janssens, Wilma Schakenraad from the MOVISIE agency and Nienke Thurlings from ANBO (refer to www.preventelderabuse.eu).

· The interview was sent in March 2010.

· The number of old people is already higher than the number of under-14 youngsters (INE, 2001).

· WHO (2002a) refers that the first surveys on elder abuse were published in England in the seventies of the previous century.

· Violence committed by omission can be understood as negligence, whether this one is intentional or involuntary. In the case of the Portuguese Penal Code, intentional omission is a crime imputable to the one that commits the act and is considered negligence when non-intentional, also punished by law (crimes of omission, chapter 37, in Dias, 2007: 905 and following).

· Law n° 112/2009 that establishes the legal regime applicable to prevention of domestic violence and protection of assistance to its victims.

· An old-age home is a “facility where social support activities for the elderly are developed through collective housing, temporary or permanent use, supply of food, health care, hygiene and comfort, promotion of sociability, entertainment and occupation of the users’ free time”, in Despacho n.º 7837, de 2002; Despacho Normativo n.º 12, de 1998.

· Already referred to in the text when this issue is approached in Portugal.
Adults, education, technology and inclusion

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Abstract

With the development of the emerging Information Age, Communication and Knowledge, the company now faces new challenges, faced with the multiple social, generational, cultural and educational, employment, social exclusion and the labor market.

It is also among adults, especially elderly veterans considered as those over-50s which are in greater numbers who seek professional reunion and / or who need to "update" with the aim of reintegration. These are adults, the elderly, social but not yet old, with criticism often addressed to the ends of the resistance to change even reaching an archaic primitivism, but that is longing to reintegrate into the labor market, the acquisition of new skills, rather than a early retirement, thus avoiding the premature departure from working life and continue to make to achieve their goals and ambitions.

Older adults seeking so through training and education, a different view and understanding of intergenerational issues, and resolution of family tensions, always stressful and often divisive, the face of new cultural patterns and values, civilization paradigm which tends to make the virtual the place of real, with consequences for society that are not well determined in its entirety. Here is designed to recognize a constructive attitude and cooperation. These are issues that are restricted to the field of technology and deserve attention of psychologists, sociologists, educators, economists and politicians.

As motivation, it is noted that these new phenomena arouse a personal interest in the quality of the teacher and also as a citizen. As a teacher because he teaches computer classes to adult classes or adult classes between regular students and the experience and observation in the field as a teacher education courses and adult education (EFA), the interest is obvious and direct. In a citizen, has emerged as the expectation and concern for social consequences which may arise from the use of new technologies.

The Internet has played an important role in free access to information and is seen not only as an information vehicle, but as a resource in the areas of leisure and social life. The development of
personal relationships, the ease of use and exemption from costs of e-mail, anonymity and disinhibition consequent possible that the virtual chat room (Chat) provide or promote the individual's personal profile on social networks.

In addition to social consequences, dealing with the info-e-Inclusion, are highlighted the consequences in terms of health, such as stress and sedentary lifestyle, the consequences in terms of labor as the lack of jobs and excluded from the info-needs frequent updating and training of individuals. The school is the right place and of great strategic importance for the development and promotion of e-literacy.

The family of the modern XXI century, with the decline of traditional family life is in the process of reconfiguration and social democratization between parents and children, there are signs of new forms of family organization, avoiding a buildup of tensions and the possibility of emergence of extreme tension and fracturing, is characterized in its interaction, the predominance of young people in the home and technological skills in the use of media equipment in the communication and leisure.

In the proposals and suggestions for the areas of Education, Sociability, Family, Health, Leisure and Labor report on e-Inclusion and accessibility, items related to Coaching in education for teachers in adult education, skills training by objectives with learning electronically or with the presence and personalized learning in schools and training centers.

**Keywords:** adult education, technology, inclusion

> Education is the only way to end the ignorance that prevents citizens from contributing to democracy

Fernando Savater

**Introduction**

The development of the emerging Information Age, the communication and knowledge have brought new challenges to the companies confronting them with multiple problems in the social, generational, cultural and educational field that lead them to the unemployment, social exclusion and difficulties in the labor market.
Motivation

As a motivation, it’s noted that the new phenomena arouse a personal interest on the teachers and the citizens too. As a teacher, when he teaches computer subjects to classes of adults or classes among regular students. It’s obvious that their interest is direct by their experience and observation in the field of education whether on normal courses or in adult education (EFA). As a citizen, because it emerged from the expectation and concern for the social consequences that will come by the use of new technologies.

Objectives

The observation in the field, as a disciple of the concept that observation is a "good school" for the individual, become a vehicle for the improvement and approach to the transmission of knowledge to students in their way of learning and according to their specific problems and difficulties, contributing thus, for a personalized and learner-oriented learning and also to acquire knowledge.

1. Information society and knowledge

The distinction between information society and digital economy leads to highlight in this new economy known as economy of the knowledge and the convergence some of its particular configuration out of the political values where the organizing role of the State is more and more evident and so the superiority of the value of knowledge, whether the organizations or the individuals. That’s, because it’s on the individual that organizations remain, and the knowledge, formal and informal, is built on each officer or employee.

2. Definition of the problem: a brief reflection

2.1. Adults, but what about the elderly?

The aged population, as a result of few marriages and decreased birth rates because the families usually have, one or two children, allied to the increasing of the expectancy of life, leads also to an increase of the senior population, with a visible decrease in young people, what is more evident in the inner and isolated regions of any country.

It’s also among the adults, especially in the veterans considered elderly, those who have passed over the 50 years, who are in great number, that still seek for professional meetings and need to "update" themselves, aiming for the reintegration. These are the adults, too old for the labor market but still active who are critical until the end of their resistance to the change. Those
who reach an archaic primitivism and are longing to reintegrate themselves in the labor market and for the acquisition of new skills, instead of retiring early, avoiding thus, the premature exit from their working lives and go on doing everything to achieve their goals and ambitions.

### 2.2. The rescue

One of the main motivations of the adult population it’s when they choose to complete later on their academic skills, not completed in the normal period of their youth. It’s the expectation for the compensation after upgrading their knowledge and skills to stay in the working life. In short, it’s their redemption in the world of work and consequently, in the society.

**Internet users by employment status in Portugal**

![Internet users by employment status in Portugal](image)

Note: Data for the first quarter of 2010

Source: EUROSTAT
3. Methodology

The thematic subjects were selected from all the material collected on education and technology doctoral thesis under the topic Generation Online defended at the University of Extremadura in Badajoz in April 2011.

In the investigation, it was made a search on statistical data of governmental and nongovernmental organizations and the data collection included also surveys by school students.

Data were processed in SPSS and converted into graphs, with its sources indicated.

4. Assumptions

Some hypotheses were formulated based on the reflection of the subject, that’s:

- More studies don’t guarantee more employment;
- Adults need frequent updating and training to follow on the evolution of the processes and the working methods;
- This is the era of information and knowledge, but many citizens are not part of the knowledge society.
- The profile of older adult students has changed.

5. Society, technology and education

5.1. Beyond leisure

At the leisure scope too, can be noted that the evolution of an individual, as a person or at home, is seen for the modern equipment acquisitions, as if it was a proof of his social power. Many of them, especially those who had already skipped up the peak of their motivations, can’t take advantage of all features anymore, although these objects have weighed in their decisions for the choice of acquiring these tools.
5.2. Education and training

The Internet has the ability to create great opportunities for education, not only as a tool for implementing educational and training activities, but also as a vehicle for facilitating communication. It allows us, for example, to attend and participate in the distance learning or e-learning, video conference, online interests, with a real entity or virtual school.

The Internet can help students (enrolled or self-taught) to access to educational resources, to obtain documents of several types, such as image, photos, video, drawing/paintings or logos, and to find out different areas that are part of his school education, since the climatic conditions to the census of population, and studies that reveal current certainties and are the result of researches and are part of scientific concepts in so far established. In fact, one of the major features of the Internet is the search. The online encyclopedias such as Wikipedia, Diciopedia, and other reference tools as well the consultation to experts, having many of them their own blogs, are a good help for the advance of papers and documentation.

Internet users by age and level of schooling

![Graph showing internet users by age and level of schooling](image)

Note: Data for the first quarter of 2010
Source: EUROSTAT

For those who teach, teachers and trainers, the Internet, with its challenges and uncertainties became also a tool that helps to modify deeply the pedagogical relationship, because it facilitates more than ever, the group and individual research, providing the exchange

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of experiences among peers, teachers or students who have questions or materials to share. In the sense that teaching is also to select, organize and manage information to convert it into knowledge and wisdom and to know how to communicate, the Internet help teachers to better prepare and illustrate different materials for the lessons, changing the way of teaching, making interesting topics, fighting against the students boredom, and modifying the evaluation and communication processes with the students.

The continuity and frequency of its use allows the development of the reading skills through the access of more specific contents, which suggest automatically the navigation to other paths of readings and learning this way to use efficiently new technologies. At the same time, it encourages the search in other search engines inherent to them solving problems of retrieving the wanted information, and developing competencies of a labor market more and more demanding.

The pedagogical use of the media in schools is vital in the education of the citizenship, according to Cyprian Luckesi from the Federal University of Bahia in Brazil, who emphasizes the determinism in the preparation, planning and implementation of the objective and concrete use of new technologies as a natural inclusion for the conquest of the citizenship. To Luckesi, man is changing himself and trying to find in the daily life what he can do for the world and himself.

The school is considered as a "locus of knowledge" and the ways of information and communication should consist of inducing the individual to complement his training under the guidance of his vocation as a realization of citizenship. The school becomes a mechanism that promotes an extension of the citizenship versus education relating to other systems of the society. In turn, it changes his thoughts into reality to take advantage of the circumstances in new space that will suffer changes in imposing a new paradigm: the man is always renewing his knowledge and creating new paths, what makes him a learner of the modern reality.

Considering that informatics and telecommunications are the two most developed and expanded areas of this initial phase in the new millennium, it’s appropriate to consider these new tools as a valuable aid in education.

### 5.3. Health and technostress

One of the most contemporary diseases that spreads more besides what is considered stress, especially in the urban centers is the digital stress, were workers in several sectors predominate and are dependent on the available information. Those diseases are caused by the

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anxiety generated by the almost exclusively and urgent (or spontaneous) treatment of the processes of works and tasks they must fulfill that depend on them.

The anxiety for the absorption of information generates the anguish because they don’t know enough about it! This is called digital stress or technostress.

5.4. Infoexclusion and social exclusion

To speak of exclusion is becoming a commonplace that besides being a concept it’s a social fact. Some years ago, the term "social exclusion" is tending to replace to the poverty one, as unfitted, being this one seen as a new perspective in an economic and social context calling for a renewal of the social subject.

Currently, there are people who not being properly poor or deprived from their freedom, are the new excluded, outdated by the technologies and by the time they didn’t follow that evolution.

The society excludes in between those who aren’t synchronized with their gadgets and operating behavioral rituals, because they never or rarely use an e-mail, they don’t search in the Internet or project themselves in a social network, limiting their cognitive horizon with a waste of a communication resource that prevents him to expand his global expertise and to develop friend relationships, even at a distance.

Among the new social excluded there are the info-excluded, who are seen suspiciously in the enterprises by their lack of skills in doing their work.

The threat of unemployment, especially the long term one, falls on these excluded, although they can choose for training.
5.5. Family and work

The family of the modern XXI century, with the decline of traditional family life, is in the process of reconfiguration and social democratization among parents and children. There are signs of new ways of family organization that avoid a building up of tensions and the possibility of emergence of extreme and breaking tensions that is characterized by its interaction, by the predominance of young people at home and technological skills in the use of media tools on communication and leisure.

Concerning the world of work, all the sectors and activities of our active society, being or not productive for our economy have developed in methods and processes of treatment and communication of the information. Their relationship with the most of entities of interest have developed too, including the acquisition and function of various types of tools that include keyboards and methods of decision through options, becoming obsolete the mechanical system and the manual methods.
5.6. New technologies in our Era

The speed and volume of information, in that order, are currently the most valued features, not only in the choice of operators and channels of communication, but also in recruiting experienced staff to operate with the modern equipment and systems that manage their applications.

### Internet users by age and level of schooling completed

(%) Internet users.

<table>
<thead>
<tr>
<th></th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>29</td>
<td>32</td>
<td>36</td>
<td>40</td>
<td>42</td>
<td>46</td>
</tr>
<tr>
<td><strong>16-24 years old</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Up to 3. cycle</td>
<td>50</td>
<td>59</td>
<td>65</td>
<td>78</td>
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<tr>
<td>Secondary education</td>
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<td>92</td>
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<td>95</td>
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<tr>
<td>Higher education</td>
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<tr>
<td><strong>25-54 years old</strong></td>
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<tr>
<td>Up to 3. cycle</td>
<td>13</td>
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<td>19</td>
<td>24</td>
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<td>75</td>
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<td>77</td>
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</tr>
<tr>
<td>Higher education</td>
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<td>91</td>
<td>93</td>
<td>95</td>
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</tr>
<tr>
<td><strong>55-74 years old</strong></td>
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<tr>
<td>Up to 3. cycle</td>
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<tr>
<td>Secondary education</td>
<td>§</td>
<td>30</td>
<td>47</td>
<td>53</td>
<td>60</td>
<td>58</td>
</tr>
<tr>
<td>Higher education</td>
<td>51</td>
<td>53</td>
<td>54</td>
<td>63</td>
<td>66</td>
<td>73</td>
</tr>
</tbody>
</table>

§ As with high coefficient of variation (results not reliable).

Note: Data refers to the first quarter of the year.

Source: EUROSTAT.

The Internet is playing an important role in the free access to information and it is seen not only as an information vehicle, but also as a resource in the areas of leisure and social life.
The development of personal relationships, by the facility in its use, the exemption of the e-mail costs, the possible anonymity and consequent disinhibition can afford the virtual chatting rooms and the promotion of personal profiles in the social networks.

In a European study available by EUROSTAT, concerning values for 2009 for Internet users by main occupation and aged between the 16 and 74, it’s observed that the higher frequencies are those of students and employees followed by the unemployed ones in fewer number but very close of the retired / inactive ones. It’s on these last two groups that one notices the great closeness between retired and unemployed or inactive, mainly in the Nordic countries and eastern of Europe.

Here are the values in Europe for the users of Internet by groups of occupation:

<table>
<thead>
<tr>
<th>Country</th>
<th>Estudantes</th>
<th>Empregados</th>
<th>Desempregados</th>
<th>Reformados e outros Inativos</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finlândia</td>
<td>100</td>
<td>93</td>
<td>79</td>
<td>63</td>
</tr>
<tr>
<td>Países Baixos</td>
<td>100</td>
<td>96</td>
<td>79</td>
<td>69</td>
</tr>
<tr>
<td>Suécia</td>
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<td>96</td>
<td>97</td>
<td>63</td>
</tr>
<tr>
<td>Alemanha</td>
<td>99</td>
<td>89</td>
<td>72</td>
<td>47</td>
</tr>
<tr>
<td>Áustria</td>
<td>99</td>
<td>85</td>
<td>72</td>
<td>49</td>
</tr>
<tr>
<td>Dinamarca</td>
<td>99</td>
<td>93</td>
<td>75</td>
<td>63</td>
</tr>
<tr>
<td>Eslovénia</td>
<td>99</td>
<td>75</td>
<td>53</td>
<td>19</td>
</tr>
<tr>
<td>Estónia</td>
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<td>83</td>
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<tr>
<td>França</td>
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<td>Luxemburgo</td>
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<tr>
<td>Reino Unido</td>
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<td>Polónia</td>
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<td>87</td>
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<tr>
<td>Hungria</td>
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<td>76</td>
<td>54</td>
<td>25</td>
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<tr>
<td>Malta</td>
<td>97</td>
<td>76</td>
<td>62</td>
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<tr>
<td>Portugal</td>
<td>97</td>
<td>57</td>
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<td>12</td>
</tr>
<tr>
<td>República Checa</td>
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<td>UE27</td>
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<td>Chipre</td>
<td>95</td>
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<td>60</td>
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<tr>
<td>Bulgária</td>
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<tr>
<td>Grécia</td>
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<tr>
<td>Roménia</td>
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<tr>
<td>Itália</td>
<td>86</td>
<td>61</td>
<td>46</td>
<td>15</td>
</tr>
</tbody>
</table>

Note: Data refers to the first quarter of the year.
Source: Eurostat

5.7. Globalization and E-inclusion

Globalization includes in its concept that of the citizen of the world. The social networks, the chat rooms and opinion blogs allied to the possibility (and inherent risks) to assert themselves under anonymity, with a consequent disinhibition of their situation, the new technologies of information and communications, particularly the Internet reveal to the individuals
who they feel even socially or economically excluded, the opportunity to develop social, cultural and trade relationships, accessing to the services hitherto distant or difficult or still impossible for their physical appearance.

The knowledge and praxis of using the modern equipment and accessories in the processing of information and communication, since its familiarity with the personal computer, the peripherals, accessories and digital devices, make the citizen self-sufficient in the productive usages and associates him to the labor market, shared situations and social intervention and facilitate the "integration" between the modernity of the young teenagers, generally the relatives and friend adolescents.

Besides the common knowledge and the acquired skills, the absorption of the digital culture, in a different attitude towards life and society, in the interpretation of procedures with materials, tools and contemporary equipment, put the citizen, regardless his age, whether adolescent, adult senior or old an (post-50), in parallel, in a social equity, in compatibility and acceptance by their peers in the society. The aged, because they are now more than 50 years old, when they saw the ICT growing up, they were already adults and still in the working world.

The promotion and guidance in a basic technology-oriented training for senior citizens is a good option to face the social exclusion arisen from the digital exclusion.

### Internet Penetration in Households (Total and Broadband)

[Graph showing internet penetration trends] (Source: COCOM, GD INFSO, European Commission, May 2010.)

#### 5.8. Culture and digital literacy

The digital literacy, the minimum requirement for the actual citizen integrated in the contemporary society, summarizes the effective use of the digital technology, that’s, to be able using and operating with standard equipments, such as the digital television, phones and computers of the third generation, as well as using applications for texts, images and other types
of communication. The citizen must also be able using the Internet and computer networks, electronic mail, that had replaced the fax. The new culture considered as a cyber-culture includes how to spend the leisure time in chats, online communication, to access channels and deals with multimedia that evolves simultaneous text, picture and sounds.

Internet users by age groups in the EU Member States

5.9. The power of information

Many employers and recruiters for the labor market do consultation of the user profiles of the Internet and social networks, searching for informal information as a support for the decision-making processes on facing so many job offers.

The information that every citizen makes available in the society, particularly in the Internet applications, such as the social networks, chats, group meetings and chat rooms are some important ingredients in the construction of an image that states what each user wants to be. The motivations, the opinions expressed and the data of personal information that is recorded there, it’s also visible. There is a way to allow personal disinhibition and to develop a new kind of social relationships and social equity for the opportunity to make the information available to
everybody for the rights to access for free information. It’s what we call democracy in the information.

Nevertheless, among the disadvantages for considering inclusion of the digital information in the Internet, we must think on its persistence and definite repeatability over the time.

Social Networks colonized the World

5.10. Democracy and anonymity

The anonymity is a fact that makes us thinking how the new information technologies and communication (only visible at the level of the users) allow secure relationships among the Internet cyber-navigators.

5.11. The indistinct applicant

Those who look for jobs include people who only had elementary education for not qualified occupations. School failure threw them into the mechanized or traditional ways of living. Nowadays, it’s everything automated and most of them are not qualified to catch the interest of the employers who looks for specialized workforce for they only have a basic school education to enroll profession for the future. They have to accept small jobs, most of them as ancillary
services, such as house or company cleaners or guards. The candidates are unskilled, who in general, are paid with minimum wages.

5.12. **Education and social justice**

Not always people with more skills or qualifications are the first to be selected for the jobs. It seems a social injustice not to give primacy to a householder aged 50 having years of experience and family to care. Companies and bosses don’t like to pay the unskilled staff or young people who look for the first job, because they have to investment continuously. The bosses start to pay them small wages, because they are in the beginning of their work life. Bosses and employers like young and “fresh” people, as we say, they like new blood.

5.13. **Skills acquisition**

Training is an option to be away from this vicious circle although qualified skills or higher education don’t mean to have a good occupation. In fact, many people remain unemployed and those who do not have school skills may have double risks. At the present, the individual and acquired knowledge, formal knowledge stated by education, as well as training and informal knowledge for those who are self-taught are added value in our society.

5.14. **Adult education and training**

As in any other branch of teaching, it’s important that the teacher or trainer have a profile that fit themselves with the education of adults with traits, personality and rooted customs and, above all, to be responsible citizens at the family and social level.

5.15. **Higher education is not a guarantee of employment**

Many of these elder adults had no chances to conclude their education in the high school or in higher education for several and variable reasons.

If the citizen has the right to education and work according to the democratic constitutions of the modern world, it’s a fact that to have high schooling don’t guarantee a good career to the owners. According to a report of the OECD in 2010, Portugal is at the end of a list of the 33 analyzed EU countries, where the higher education levels don’t decrease the risk of becoming unemployed. Those who are not high schooled are likely to remain without work.

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5.16. Coaching of teachers and trainers

Nowadays, education has no longer following exclusively heuristic and theoretical methods. It’s wrong that the notion that theory and practice are opposed fields, because both of them are complementary and often multidisciplinary.

Facing the difficulties and limitations of the learner whether in knowledge or in practice, the teacher has at his hand a working tool for guidance that allow him to help the student to perform his tasks and achieve his objectives in his learning: the coaching.

This technical guidance on learning has, after analysis of the individual or group and their level of performance as well as the class, three basic steps:

- Plan jointly goals and accomplishments;
- Motivate, and
- Training and observe the situation.

5.17. Internet: a new resource

People interaction with others doesn’t require their physical presence and the new technologies, particularly in the case of the Internet, allow people to give voice to those who being isolated by the geographic situation in which they live, or have little representation in the education system can this way, to transmit to everybody their expectations and their vision of the world. Today, for the schools that were previously isolated by its geographic location new doors open up where the possibilities are so many: projects of exchange, sharing of information, distance learning, study visits, etc.

The discussion forums available on the WWW (hypertext embedded in a page divided by thematic topics) are places for sharing information and they have the great advantage of being organized by thematic units being very easy to select each of them. This way, the participants interpret and analyze others perspectives, reflecting themselves on their own knowledge and readings, presenting their views and network addresses to confirm their ideas. Rao (1997) considers also these forums as an excellent learning resource, where it’s possible the exchange of opinions, ideas and experiences.

Being the Internet now part of our world not only as a source of knowledge but also as useful tools for applications of data processing, including the school space, education can’t ignore this reality and can’t be seen as if it were not part of it, as if it had nothing to do with the classroom. Rather, if until recently there were few doubts that the classroom would be a source

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of information by excellence, today this idea is definitely and completely outdated. The several tools available in the net offer innumerable opportunities to learn, to demonstrate and to document, and this fact can’t be despised at all.

Thus, elder adults seek a different view and understanding of intergenerational issues through training and education, and in the solution of family tensions that are always stressful and often divisive facing new cultural patterns and values, a cultural paradigm where the virtual tends to take the place of the real with consequences for the society that are not well determined in its entirety. Here, a constructivist attitude of recognizance and cooperation is designed. These are issues that are restricted to the scope of technology and deserve some attention of the psychologists, sociologists, educators, economists and politicians.

5.18. E-employment and telework

Another possible solution is to create a self-employment where some possible suggestions are the e-employment, developed through a list of contacts, having the Internet and commercial applications as its support. And so has the telework, but this one, having the phone / fax as the basic tool of communication.

5.19. Beyond cybernetics and the future Eras

In the future, it will be able maintaining a generalist education to accommodate and to work with the flood of information that grows exponentially at each fraction of time that goes on in our world?

The worker, more and more specialized, will be hypothetically trained only with the information and technical skills that needs to perform the functions and objectives that would be to it intended.

As there are always several variables and components that integrates any production or performance, these one will coordinate as a team, being it’s performance an adding value to support his job.

6. Social trends

The society tends to a standardization of several ita that integrate it, from the elementary training, from the behaviors to the procedures in a clear attempt to reconcile themselves. But, out of this control and standardization are, however, the rites and myths, according to the faith and the social beliefs of each ethnic or family group.
6.1. **In the technologies**

In a society that is supported by operators, platforms and networks, there would always be an increase in the use, search and acquisition of modern digital communication equipments, since the common televisions now digital ones, phones, personal computers, laptops and pocket computers in a clear tendency to increase their functionalities and miniaturization.

The continued growth of networks is a finding, as well as the cyclonic evolution of the equipments where all of us work today or use in the day to day, but will be tomorrow obsolete.

6.2. **In the search of contents**

With the extending of the search for cultural, education and social information among others by users who don’t necessarily have knowledge of library and documentation, the search engines and databases tend, more and more, to use semantic expressions instead of descriptors or keywords.

6.3. **At work**

When companies don’t invest in an adult senior employee, they are rejecting his individual and entrepreneurial knowledge, the added value of any company or activity of today.

6.4. **In health**

An emerging phenomenon, whose mechanisms and extreme consequences are still badly known, is the new stress, the digital stress, able of generating some disturbing anxieties, insomnia, insecurity, in short, the called technoanxiety.

6.5. **In education**

The training of the adults that surround or had exceeded the age of 50 (the *Kotas*, as our teenagers call) has an available market growing over time that is complemented by the digital literacy, because the current workers and officers of this information society, communication and knowledge, they also will need to update themselves, in order they can monitor the evolution and the changing of the methods. Training tends to be individualized in a interactive computer terminal by each of the student and interactive, with the option of being at distance, through the common broadband communication installed at home.
6.6. Examples of the daily life

The Open University, as the name seems to suggest, gives access to people who are seeking a complementary training, on a regular basis or in modules, according to their interests facing the curriculum offered, whether personally and / or at distance.

The high schools “Jane Austen” and the “Marquis of Pombal” are examples in the fight of social exclusion, with professional courses or normal educational or training courses (CEF) for adults. Many of these courses run after the work time, due to the greater frequency of the students with occupational activities during the normal business hours, or are unemployed, but almost all of them have family responsibilities that were increasing with the removal of the age of adolescence (innocence).

7. Data processing and interpretation

The data were treated in tool for statistical analysis for social subjects (SPSS) and the obtained graphics were integrated in the presentation of the communication.

Conclusions

Besides the social consequences that deal with info-e-inclusion, the consequences at the health level are highlighted, such as the stress and the sedentary lifestyle, as well as the consequences at the labor level, such as the lack of jobs of the excluded and the needs for frequent updating and training of the individuals. The school is the right place and of great strategic importance for the development and promotion of e-literacy.

The senior adults, known as elderly, besides having the cognitive knowledge, formally declared, they also have the non-formal and experiential knowledge, being this individual knowledge an asset for the entrepreneurial and professional knowledge.

Educational perspectives

The current trends of learning emphasize the fact that the individual must construct himself his knowledge. This doesn't mean, however, isolation or individualism, what highlights the need for learning and the need that the student has to relate himself with other students and interact with them, skills that are necessary, even in autonomous and self-oriented learning projects.

The use of the Internet in situations of learning is assumed beyond a space of global communication, being relevant to reflect ourselves how the Internet can be a source of support in
the construction of learning, that is, of the individual knowledge and his new role as an education resource.

Besides being an excellent source of information, the Internet allows the interaction with others, ie, to share the opinions and criticisms, and to have other perspectives and interpretations. To live in a society based on information that requires the ability to acquire, analyze and decide based on information is a factor of survival and inclusion for the individual’s ability to think critically and to solve problems. The collaborative learning gives to students the opportunity to manage discussions to one another, taking responsibility for their own learning and becoming them capable of critical thinking.

**Permanent education: an investment for the work in the future**

In the proposals and suggestions for the Education, Sociability, Family, Health, Leisure and Labor areas, the e-Inclusion and accessibility are reported as items related to coaching in education for trainers of the adult education, the acquisition of skills by objectives with e-learning and learning in the presence what is called b-learning, personalized learning at schools and training centers.

It seems appropriate to remind "Descartes' Error" by the author Antonio Damasio in highlighting among his findings that we can’t treat our body regardless the spirit, ie, the body and spirit are a unique thing and can’t be treated in an independent way. The culture, education and training will always be its added value in the current society at this knowledge era.

I also remember a thinking as a believer I’m, that teacher’s occupation is like a priesthood’s one, in the words of a Spaniard Nobel Prize, Fernando Savater, a famous thinker, philosopher, writer, and at the same time, a good teacher. "Education is the only way to finish with the ignorance that avoid the citizens to contribute for democracy".

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From apprentices to masters: elderly life projects and active aging

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Abstract

A specialist must also be a researcher: of the other (as a subject) and of himself. Plunging in the subjective dimensions of life quality and active aging, we look forward to understand, from the point of view of the elderly, which place takes, in their life project, the transmission of the immaterial legacy between generations in working context, we will present pieces of ethno biographic interviews collected in the master’s degree probation, showing from a dimensional perspective, pieces of life stories of a barber with 77 years old and of a female weaver with 68 years old that, in their perspectives, are examples of positive aging. These two people share for a long time their knowledge with younger generations.

As part of an advanced culture, Mr. Silva is about to retire from active service, projecting his retirement after sixty years of work. Mrs. Teresa not only is still committed in her craft but she also defines objectives about other ambitious and real interests for her future. In common these two people have only the fact that after sixty-five years, they are still connected to their jobs and battle for its cultural continuity.

The cases presented will contribute to understand better the importance of intergenerational connections in working context. They will allow us to understand that the subjects get older in different ways and, therefore make their projects in very unique ways. They will contribute to explain how these people, which one with its resources, could, at the moment, face up to the aging process, undergoing a change, minimizing losses and appraising little things, many times (apparently) insignificant. In these cases those who teach can also learn and a lot! We will
disassemble the idea that life quality and active aging depend on material benefits or even on intellectual resources. We will focus on the uncritical usage of concepts such as active aging or life quality, since these and other main concepts may easily consolidate into ethnocentric concepts that influence the development of promotion programs to an active aging.

In this study we look “beyond the appearance”. We will resort to ethnography, appraising the subjective instead of the objective, focusing on the uniqueness of the life stories and projects. We are also going to consider carefully about the fact that we have concluded that the crafts teaching, like the cases studied, with means of total and practical transmission and also proved through the contact between the one that teaches and the one that learns (“do as I do”), isn’t that so much different from the way that the art of investigating is taught. Finally we want, through this presentation to tell that memories give the present stability to make projects to the future. Thus, project and memory are linked, giving life a meaning, that is, to self-identity itself.

**Keywords:** active aging, life quality, project, intergenerationality and immaterial legacy.

### 1. The technical intervention as a researcher

It is now common to hear that social work, cultural activities, personal development and community must be done with others and not for others (Vieira, 2011). Prevails, therefore, enter the world of another. Do not become the other but, as far as possible, understand it from your own point of view (emic perspective, Vieira, 2003) and not interpret it ethnocentrically from ideal models modeled from other contexts.

The technical assistance is an investigator of others and of himself.

### 2. The methodology

The prime research methodology that we present here the cases of Mr. Silva and Mrs. Teresa is essentially an ethnographic methodology and hermeneutic (Geertz, 1999) and is based on interviews. These interviews, the result of long talks centered on the point of view of informants, to the point where they can speak for themselves and their crafts, the simple presence of the researcher who has some questions and assumes a posture of listening and learning, we call them ethnographic interviews or ethnobiographic when the conversation focuses on the historical dimension of life (Vieira, 2003, 2011).
3. Sharing knowledge: tales of a barber and a weaver

In developed societies, intergenerational relationships outside the family to embody the social relations established in the professional, educational, political, religious and leisure. These relationships can have a positive outcome - cooperation - or negative - conflict. The work (in the broad sense) can be an ideal opportunity for cooperation between generations.

“[...] Intergenerational relations thus constitute an effective instrument to address the phenomenon of aging, because they create a positive bias in the family and social relations in general”.

As Vieira (2011), "any society or social group needs to transmit knowledge and memory to ensure their social reproduction (...)” (pp. 53-54). And this demand is not limited to "school knowledge". The world of artisans and the so-called traditional professions is increasingly a world of the elderly. The shoemaker, the barber, the watchmaker, weaver or tailor, among others, are in "danger of extinction." These crafts often accompany older until very late and disappear as their guardians leave us.

*Sharing knowledges: reports Mr. Silva the barber*

Mr. Silva has 77 years, is married and has two children and four grandchildren. It features an enviable physical figure. In deep voice and easy laugh, is a very popular person in their midst. It is declared as a hairdresser for men (and not as a barber). Approach life with optimism, which claims to have been crucial to overcoming tough times. He works eight hours a day, Monday through Friday in the lounge with his two disciples, and on Saturdays, "opens the door" at seven in the morning and closes at one o’clock, week after week for over 60 years . At 13 he began learning the profession until she was 17, his teacher, described as "rude" but "a good artist and fast," and he took emigrated, alone, toward the barbershop. With 25 years "gave hop". Challenged by an older brother who was in Angola and saying "you won right there," got the tools and emigrated. He says that when he arrived there "saw the world" were 15 years of "progress" in Benguela, first as an employee and then again as boss.

Mr. Silva said he learned more than what they taught, that is, understands that (re)built and enriched the legacy immaterial that he was "left." There seems no room for another approach to the profession, not on prejudice to be successful: "(...) I learned more than what they taught ... and I believe that teachers, who are now teachers and I taught (...) will have to learn because I was not ill of them ... is thus (...) ". Stages of education postulated by Mr. Silva will meet the "do as I" of Bourdieu (1989).

Points motivation as the main ingredient for learning. Clearly separates its job (teaching) of the parents (education) of his apprentices. Refers to the secrets of his profession, techniques, realizing, however, who has trouble verbalizing them. He knows to put them into practice, that we
have no doubt. The point is that probably did not give him enough time to teach us. If we extended the study and if we observe the subject in his practice, perhaps we could help to "translate" the technical body (Mauss, 1974), that together, we tried to construct a "grammar" of his art.

He speaks with pride of his room and, without sentimentality, anticipates their withdrawal and the passage of the testimony: "[...] It's called an oasis ... That is all that we like to have ... But I'm not going to miss when you drop [...] the parish will be for them ... someday I'll give them that ... Is not it about time ... [...] When it comes to a close, comes to an end, eventually! I will then live forever...". It is pragmatic in relation to passing the baton as if he had learned to live with the different life stages and their implications. Not too much value the fact that the continuity of his art assured. It seems "natural." In fact, it is in some ways, a repeat of its history as an apprentice. Mr. Singh says it is time to "prepare the old age." This includes rides, collaborating with his wife in the backyard and, essentially, "living a different pace" without rigid schedules, with fewer responsibilities.

Intends to return to Benguela - Angola, where the family was very happy. The word "destiny" is not in the vocabulary. When I asked him to clarify, said: "[...] the fate we who do! If we are waiting for fate to that, I do not know where we will stop ..."

**Sharing knowledge: tales of D. Teresa, a weaver**

Teresa has 68 years, a widow, has a sweet voice and breathes serenity. He has three daughters. The two youngest live with her. Weaver and is also considered an expert in teas and medicinal herbs. He lived the life of agriculture, with the help of which yielded (and yield) the work done on the loom. Born in 1942 along with one tungsten mines where the mother washed the land. Never knew her father. At three years he lived with his grandmother, whom he says have never been well accepted, "a shack" along with his six brothers and some cousins. The girls slept on the floor, under a loom. The grandmother never wanted to go to school: "[...] my grandmother did not want ... we learn to read ... Oddly enough, he said that reading it was the bane of women ...

At 14, he was serving out. He worked in the fields, made the deal of the houses of the bosses and looked after the children. He made it to adulthood, when he returns home from his grandmother to the place of her sister, however, married and left home. A year later, was married and moved to the in-laws' house, where he still lives today. Before having children, persuaded her husband to buy a loom to make some money for the house. During three years has built a lot of sheep wool and linen that customers brought to him.

Already after her husband died, invested in a new loom and got the space he calls "the Loom House," an old corral. Without doubt, an almost mystical place, where he is active as a weaver and where some dried herbs and teas, with lots of natural light and where almost only hear the birds. In his speech has some characteristics of ingenuity and justifies the use of
technical terms with the fact that he had two experiences to teach teenagers to make as part of a project developed in the school area.

It was she who, with the help of a school staff and students, set up the looms that the Ministry purchased. Makes it clear how complex weaving. In his words, "[weaving] is the art of patients ... a weaver and a weaver must be very patient ... "I love the experience of teaching in school. Still find former students who knew at that time 10 years ago. Guard relics like the notes you made. Do not sleep with the worry of letting on that they did not master the technique.

One day he came up with a very important book. From there, the youngest daughter began to become interested and get more involved and now the mother who says she learns is: "[...] and my teacher was a light that it came from my sister, the fact I have seen my grandmother there with the loom ... and then go learn at my expense and this child now ... I have also been transmitted knowledge more ... because it develops! [...] She weaves, she puts the web, the loom, she does here ... [...] of the way she thinks ... [...] I just had to teach him ... even one little thing, because basic course ... new people, and likes ... she makes a lot more innovation, more, much more than me ..." Speech on the accuracy requires that the craft just because a thread out of place for her to have to redo the web.

I thought that the daughters had the patience to weave, but was surprised with the newest: "[...] [she] can do many different things, but I also like her to know to do it [make] ... and how it was spontaneous, it ... and then I ended up still learn from it ... look, it's icing on the cake! "Who teaches also learns (Freire, 1974):" We have to learn sometimes almost more than what we teach, but that's in everything in life ... is not only an art ... everything is ... everything is ... if we pay attention and we are open chest with each other [...] learn a lot! Learn it all! You learn to die and to die without knowing [...]

4. The analysis

The subjects presented here have projects and walks of life very heterogeneous. Each spoke about their modus operandi and the way the learned and transmitted (and transmit) knowledge to their successors. We believe that for them was a difficult task to speak about the topic, as it had to be a distance (or rather abstraction). It is something that probably even then, there was (only) while body language. Perhaps Teresa, for having had an experience closer to formal education, has been more comfortable. She had done this exercise. The operating modes of these artists have long turned to automation, ie, unfold "naturally", almost effortlessly. Perhaps in this case would also be appropriate to make a parallel with what happens to the researchers, human, rational, sensory, that during the field work, they need to approach (diving into the skin of the subject) and to distance themselves (intellectually, of course) during the construction of the object.
5. Perspectives on aging and age diversity of modes of

Fruit of modern Western society, adult-culture (in which exclusion occurs through the establishment on behalf of a Cartesian rationality), centered on the idea of producing wealth, and deprives the child of his old social places. This industrial society is formatted for active and productive adult. Rejects the old, offering no survival to his work. Losing the work force, he is not a producer or producer. Neusa Gusmão (2003), in the book Children and Aging: Research ideas, which is organized, conveys the idea that children are represented as beings who are not, that is not yet productive. Since the elderly are creatures that have ever produced.

The age appears associated to the identity. But ultimately, who we mean when we talk about seniors? And the elderly? We talked about when we talk about old age? In a capitalist society the body is the embodiment of that age by the look, the visible, is something that in itself sends a huge amount of information to those around us. This information is learned based on the life histories of each, in more or less formed ideas about the world. The social representation of old age also varies by gender. While women are victims of wrinkles (which symbolize the passage of time) and, therefore, succumb to the care of the image, for men the same white hair and wrinkles have an opposite effect, establishing itself as a "powerful weapon "for conquest and seduction.

Mr. Silva and Teresa represent old age and speak either of aging, now of the "other", in various forms. While Mr. Silva is on the one hand, "the other old men" in a negative way, attributing the lack of education and education as the foundation for the progressive withdrawal of the society, on the other hand, recognizes that is the way of old age, which fears that lasts too long and that, therefore, can not handle it. In the present says she feels young because it deals with the very young, with whom he likes to relate. The Teresa speaks of himself and his experiences as a caregiver for 35 years, but focuses its attention on the phenomenon of demographic aging, expounding on the implications, presenting a very interesting discussion, concluding that those who will suffer most are the young.

Then there are many forms of aging (and look at our age) how many people they get older. The passing years make the differences become more pronounced. From the perspective of those ages, it is concluded that the experience and is so different, that is their similar but different.
6. Project, quality of life and active ageing

The interviews allowed us to understand that memories give consistency to the present to formulate projects, through which, regardless of its simplicity, if the demand (and, in this case, if you can) have a quality life. Mr. Silva and Teresa consider themselves happy, finding, however, different reasons to feed that feeling.

What does it mean age successfully? How to keep a balance between gains and losses inherent in this process? How to stay resilient? Throughout this investigation we found numerous examples of the subjects sought (and still seek) to give a meaning to their lives, having in common the fact that, as in old age, remain committed to their art. Aspects such as investment in intergenerational relations, family and professional projects, the interest of others for their stories, learning to read (in the case of Teresa) and transmission of intangible heritage, among others, are means of obtaining satisfaction and quality of life in old age.

We also learned that in addition to investigating the investigator about the informant, also both parties (researcher and researched) investigators felt himself. Finally, we realized that the teaching of crafts as the subjects studied, with total transmission modes and practical and embodied in the contact between the one who teaches and who learns ("do as I ") is not so different from the way taught the art of investigating what Bourdieu (1989) advocates.

Bibliography


Rethinking empowerment: a postmodern appraisal of critical educational gerontology

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Abstract

A key rationale in older adult education is critical educational gerontology [CEG]. CEG is concerned with the centrality of politics and powers in the way that late-life education works, with its ultimate goal being the empowerment of older persons to confront the social system with a view to changing it. However, the coming of ‘late’ and ‘post’ modern social realities means that CEG has entered a profound intellectual and conceptual crisis. Its foundations were constructed during a time of ‘modern’ capitalism when social inequality was structured along strict class lines, and when the principal focus of ageing-related social policy consisted in bridging families’ income before and after retirement. Since then industrial societies have become increasingly characterised by more flexible forms of work organisation, an increasing breaking down of the neo-corporatist relations between state and labour, and rising levels of cultural fragmentation. For some educators, the time has come to close the lid over CEG, accept its analytical and practical obsolescence, and embrace other more relevant rationales. On the basis that retirement is far from being a uniform experience, many argue that the key goal of late-life education is to aid older persons respond to a fast changing world due to technological development and changing values.

Whilst acknowledging that ‘post’ modern ways of living are here to stay, this presentation rejects that the notion of empowerment has no place in contemporary social realities. Suffice to say here that as much as 19 percent in the European Union experience social exclusion and at-the-risk-of-poverty lifestyles. In such circumstances, the quest of linking education with empowerment and transformational change remains as necessary as ever. It is argued that the problem of CEG lies within its modus operatum, rather than its modus operandi. The way forward does not lie in ditching the critical epistemological framework for late-life education, but to renew it in a way that it rediscovers its empowering spark in a postmodern world. The presentation advocates CEG to work towards personal as well as social aspects of empowerment. Although individualistic forms of empowerment offered by vocational competence and consumerist acquisition may be modest
and circumscribed, at times even illusory, they are demonstrable and achievable in postmodern realities. In other words, CEG must accept that social empowerment in later life is also possible through educational activities promoting autonomy and self-actualisation, both of which can influence individuals to improve their social and personal well-being.

The key argument in this presentation is that the goals of CEG and postmodernity are not necessarily contradictory. Critical epistemologies of learning in later life have the potential to bring personal transformation whereby older persons become more able to take control of their social circumstances and achieve their goals. The pragmatic implications and possibilities of this claim are illustrated by reference to a case study on late-life learning initiatives in Malta. The title of the learning programme was Improving financial capability provision in later life. Following NIACE’s (2008) briefing sheet, the course aimed at taking account of the changing personal, financial, management skills required by older persons. This is because there exists two dimensions of empowerment - namely, structural and subjective. The case study confirmed that whilst there is no doubt to the improvement of older people’s lives when social structures are altered in a way that facilitate and improve the lives of older persons, empowerment can also be achieved if older persons are awarded the necessary skills to manipulate their immediate environment to their advantage.

**Keywords:** empowerment, critical educational gerontology, postmodernity, social change, personal transformation

**Introduction**

Throughout the past decade much of my work in the field of older adult learning was driven by an aspiration to consolidate and improve the ‘critical’ potential of late-life education (see Formosa, 2000, 2002, 2005, 2007, 2009, 2010, 2011). A running thread in my research was, and still is, uncovering the extent that structural inequalities in latter life limit the participation of subaltern elders in lifelong learning, whilst also seeking to place the notion of empowerment on the agenda of late-life learning. As Mezirow (2000 : 26) underlines, “a sense of self-empowerment if the cardinal goal of adult education”. In essence, empowerment refers to the “process of enabling excluded and marginalised individuals and groups to exercise greater autonomy in decision making” (Barnes and Walker, 1996: 380). There are four criteria for assessing if empowerment has been achieved:

1. there must be a structural change, 2. the aim or intention must be grounded in a future vision that includes freedom, democracy, and authenticity, 3. there must be a shift as in what counts as knowledge, and 4. the change must be based on conflict theory.

Scott, 1998: 179
1. Critical interludes

As is usually the case, my work - together with the field of critical educational gerontology [CEG] in general - received its fair share of approval and criticism. In an early critique, Percy’s (1990) argued that later life is marked by extensive heterogeneity so that many elders are actually positioned in advantageous positions. The objectives of CEG are perceived as too ‘dubious’, ‘comprehensive’, and ‘wide-ranging’, to be successfully tackled by educational classes attended by a very minute percentage of older adults:

“Academics rarely say anything unequivocal about the large issues; if they do, there will be one academic to dispute what the other has said...Moreover, the assertion that ‘central to geragogy would be its attempt to unsettle the complacency that older people feel’ does give pause. Who judges? Who decides what is and what is not complacency?”

Percy, 1990: 235

Percy champions a humanist epistemology for late-life education whereby the educator is not attributed with any special vision and stresses that the benchmark of older adult education is the notion of ‘older people as teachers, facilitators of learning, role models, educational resources, [and] repositories of wisdom’. If there needs be an educator, his/her role ‘is to facilitate the process of learning for the learner, not necessarily to persuade him to social action or to be dissatisfied if a certain political awareness is not achieved’. As regards the question as to whose interests are to be served, Percy argues unequivocally that the answer has to be the interests of all people generally and the interests of older people in particular. This is because he believes that the argument that the general preference for liberal, non-vocational, education in later life as an expression of middle class values is simply ideological reductionism. The truth is, Percy concludes, that the liberal preferences of older people are precisely the result of having reached a point of the life-cycle where they have more leisure interests and are generally free of vocational and domestic concerns.

Another body of work that grapples critically with CEG, and with my work in particular, is that authored by my friend and colleague Alex Withnall (2000, 2002, 2006, 2010). On the basis of an empirical study on the choices and experiences of older adult learners, Withnall (2006, 30) claims that “the drive towards emancipation and empowerment implicit within [CEG] is inappropriate in that it assumed an unjustifiable homogeneity among older people and appears to be imposing a new kind of ideological constraint”. Withnall refers to the difficulties experienced by critical educators in leading older learners to satisfactory levels of emancipation as evidence that power is a slippery entity and, hence, of the self-defeating nature of critical standpoints:

“(…) individuals within groups often seen by educators as powerless may in fact possess considerable power within other networks in which they operate so it is
probably too much of a generalization to talk of people as completely 'powerless' or as having been disempowered’.

Withnall, 2010: 35

Influenced by the work of Usher and Edwards (1997), Withnall (2006, 30 - italics in original) argues that since nowadays retirement is far from being a uniform experience there is a need to shift ‘the debate away from the policy maker and practitioner perspectives on education towards learning and ensure that the voices of older learners themselves, hitherto largely ignored, can emerge’. In line with pragmatic views on lifelong learning (e.g. Aspin & Chapman, 2000), the searching for a grand narrative for late-life learning is posited as a ‘vain quest’ on the basis that learning is an essentially individual undertaking with different meanings for different learners. Seeking to establish learning in later life as a solution for older persons to meet their need to respond to a fast changing world due to rapid technological development and changing values, she advocates that ‘an alternative formulation might be to think in terms of ‘longlife’ learning that would straddle economic, democratic, personal and other concerns across the life course in an inclusive way’ (Withnall, 2010: 116). This is possible, she argues, if learning in all its forms would then come to be seen as a more broadly based endeavour that incorporates the need for economic progress and social inclusiveness in tandem with the recognition of individual desires for personal development and growth as people age.

2. Postmodern cultures of ageing

In recent publications (see Findsen and Formosa, 2011; Formosa, 2011), I have taken to task such criticisms and constructed strong defensive arguments in favour of critical educational gerontology. Herein, I opt to travel in an opposite direction. Following McLaren’s (2000 : 205) advice that “the pedagogical agent must continue to press forward while at the same time being self-reflexive about the contradictions and aporias in his or her political project”, I will now seek to embrace, build, and expand - as much as possible - upon Percy’s and Withnall’s criticisms. This turning point resulted from a re-reading of the afore-mentioned criticisms and realising that, ultimately, Percy and Withnall did not refute the goal of the critical paradigm. Indeed, I am sure that both attest to the need for academics and policy-makers to work hand-in-hand to improve the everyday life of older persons. What these authors question is the Freirean, collective, social transformation process upon which CEG is hinged. Despite my long-standing resistance to such a denunciation, Percy and Withnall do have a point. We are no longer living in a ‘modernist’ epoch of organised capitalism Nowadays self-identity has become a ‘reflexively organized endeavour’, built around the development of coherent, yet continuously revised, biographical narratives (Giddens, 1991). Self-identities operate on the basis of choice and flexibility, hence replacing the rigidity of the traditional life cycle with its predetermined rites of passage. Such changes have brought many a positive effect to the lives of older persons (Gilheard and Higgs, 2000). Post-
traditional societies develop new youthful images of retirement, a blurring between midlife and later life, and extended later life into a complex of states of personal growth development which takes into account the human diversity found in older cohorts. Increasing material affluence and consumer activity, as well as individual assertiveness, are now enabling retirees with an unprecedented potential to engage in cultural spheres of ‘identity refurbishment’.

Although the exact break between ‘modern’ and ‘postmodernism’ has emerged as an enormous bone of contention, a dispute which in most probability will never be satisfactory resolved, it is evident that the contemporary epoch is more postmodernist than previous decades. Although many educators subscribe to Finger and Asún’s (2001: 114) assertion that postmodernism is the equivalent of “many roads to nowhere”, postmodernism has a potential to “focus on the margins, the excluded, those who have no control over their lives...to speak for those who have never been subject (active human) but who are rather so often assumed to be objects” (Rosenau, 1992: 173). As a result, it seems too simplistic to accept that the notion and practice of empowerment has no place in postmodernism. For instance, working in the context of psychological counselling, Shindler (1999: 166) points out how the fact that some “therapists are more interested in intervening at the level of the nature of the stories families tell about themselves and their intrafamilial patterns of narration than in describing underlying psychological structures in individuals and families”, can actually provide a sense of empowerment to older persons since the caregivers and the client can join forces to generate a new story of narrative. In Shindler’s words,

“Unlike the ‘modern’ worker, the postmodern therapist does not conceptualize or intervene out of commitment to the belief in the existence of an underlying ‘true’ meaning or single theoretically valid interpretation of the client’s story. The empowering process begins when the searching and meaning between worker and client is established such that the latter plays a major role in its interpretation of meaning”.

Shindler, 1999: 166

The remaining parts of this paper attempt to embed the afore-mentioned issues in the context of older adult learning. After all, even Freire (1993) – especially in his later works - “sought to retreat from the totalising...narratives of modernism, oppression and emancipation to take account of the critiques of...postmodernism and recognise how inequalities of power are mediated by different subjectivities and situations with respect to differences” (Usher and Edwards, 1997: 47). It thus attempts to situate a ‘postmodernism of resistance’ (Giroux and McLaren, 1994) in the context of older adult learning, an approach that “retain[s] the vision of Freire but also to move away from the dangers of previously identified tendencies towards theoretical vanguardism and the crude binarism represented by the stark alternatives of education for domestication or education for liberation” (Usher and Edwards, 1997: 47-48).
3. Personal transformation

The modern impetus underlying CEG means that it tends to neglect “the ‘meanings’ with which people imbue their lives and which colour their relations with others” (Layder, 1994: 57). This stance neglects that the field of adult education has a long tradition of personal transformation whereby learners experience higher levels of empowerment. Most famously, Mezirow (2001) argues that learners hold various world-views or perspectives as they relate to a number of personal and social issues ranging from democracy to beauty to education. For Mezirow, we can transform our perspectives in a safe environment, where reflection through dialogue on the fundamental premises that guide our lives, are challenged by the group members. Although it remains that this can only be done in a group or in social interaction as learners often need help uncovering undisclosed meaning schemes, higher levels of empowerment can be achieved without wider social structural transformations. Indeed, the four criteria for assessing the occurrence of empowerment can also be situated in the personal realm. In Scott’s words,

“For personal transformational learning, structural change occurs in the psyche of individuals. The structure of the psyche involves an awareness of or conceptual understanding of the ‘self’...In postmodern times there are multiple selves, each one of which may hold different interests, respond differently to conditions and contribute to a decentred self or divided self in a fragmented society which no longer holds agreed-upon standards or mores. The aim of personal transformation is to align various disparate parts of the self to gain coherence, peace and a sense of wholeness. This promotes a sense of freedom and authenticity to meaningful work and activity in the social sphere”.

Scott, 1996: 183

4. Reconceptualising power

In many respects, CEG is also at fault for clinging to a traditional view of social power characterised by a zero-sum theory of collective movements. In CEG, empowerment is often determined as something that is done to others, that people do to others. Despite the good intentions of those who seek to empower others, the relations of empowerment are themselves relations of power. As Solas (1994) suggested, some of the key assumptions, goals and practices of empowerment can function to perpetuate power relations between social workers and clients. In this respect, the coming of postmodern social structures lead us to embrace Foucault’s (1977) stance that a dichotomous, binarist, understanding of power, which suggests the polarisation of categories such as ‘powerful’ and ‘powerful’, is insufficient to understand how the process of domination and empowerment operate in contemporary times. Foucault’s (1980) analysis of power locates it, not in a sovereign body but in a more diffuse assembly of groupings. He maintains that the main focus of analysis should be the local and regional points of power rather
than the its concentration or centralised forms. Although some argue that Foucault’s (ibid.) stance dissolves the possibility of subaltern groups increasing their levels of empowerment and emancipation, Pease (2002) rightly argues that to acknowledge that power is diffused is not the same as accepting that people’s power is equal as his writings do acknowledge global forms of domination. Foucault’s insight, which in many ways highlight the shortcomings of CEG, is his concern with the way that global forms of power are influenced by decentralised and localised forms of power. In Pease’s words,

“One of the implications of Foucault’s analysis of power for political struggle is a questioning of the strategy of unified, organized mass action. Mass political movements in this view may not be the most effective forms of social change. Rather smaller groups of activists may be more successful in bringing about change than large-scale organizations...if power and control are not vested in any central point, then resistance does not arise from one single point...We bring about social change through local struggles that undermine institutional power where it reveals itself in ideology under the mask of humanism, or as it operates in homes, schools, prisons, and factories”.

Pease, 2002: 139-140

5. Rethinking empowerment

The reconceptualisation of power, away from a modernist to a postmodernist agenda, warrants a rethinking of ‘self-empowerment’ in older adult learning. It is important that adult educators consider individual differences among learners in their understanding of power and empowerment. This is because what is empowering for one person may not be everyone’s cup of tea. There are two commonsensical yet important ways to consider individual differences as we think about learner empowerment:

“One is to help learners develop an awareness of their own learning style, psychological type, values and preferences. Understanding oneself is a component of critical self-reflection, so this serves two purposes - fostering self-awareness and empowering people to make decisions as to how they learn best. The second important strategy is for educators to develop an awareness of how learners vary in their preferences and to incorporate this awareness into everything we do. This does not mean that we need to develop four or eight or sixteen ways of doing everything, but rather that we are conscious of the variety of responses to what we do and how the same act on our part can lead to completely different reactions”.

Cranton, 2006: 131 - *italics* added
In practice, learner self-awareness can be augmented informally or more systematically through various inventories. Informally, a variety of activities can be used - such as values-based simulations, critical incidents, and role plays, for example - value-based simulations, critical incidents, and role plays, or even simple discussion and questioning – all of which can help learners become aware of their preferences. For instance, attempting

“(…) to push an introverted learner to be ‘heard’ in a discussion circle is disempowering, not empowering. Asking someone who is thoughtful and analytical to express deeply personal emotions may increase self-surveillance and even lead a student to invent things to please the teacher… [On the other hand] encouraging someone who is extraverted and prefers to learn by doing to engage in quiet self-reflection or the contemplation of abstract and theoretical issues will similarly feel disempowering to the individual”.

Cranton, 2006: 133

In summary, it is important that educators do not assume that all individuals respond in the same manner to empowering strategies. Individual’s values, learning styles, past experiences, as well as personality preferences, contribute to how they will come to become empowered and how they will respond to educator’s efforts to help them achieve higher levels of self-empowerment (Cranton, 2006).

6. Case study

In an effort to embed the above reflections in a praxeological framework, I coordinated a elder-learning programme in Dingli, a village situated in the western region of Malta, whose rationale and curriculum was based on postmodern, rather than critical, epistemological principles. In short, the course did not seek to lead towards social empowerment, whereby learners are encouraged to change the immediate social structures. Rather, the course endeavoured to help older learners to gain more individual forms of empowerment - in other words, to equip them with individual skills that will render them more capable to manipulate the surrounding structures in line with their goals and objectives.

The title of the learning programme was Improving financial capability provision in later life. Following NIACE’s (2008) briefing sheet, the course aimed at taking account of the changing personal, financial, management skills required by older persons. Indeed, the many new financial products available are forcing people to make complex decisions, even for the simplest every day transactions. For instance, the sudden spread of ‘Chip and Pin’, which requires being able to remember numbers and its almost mandatory use in many locations, is a contemporary illustration of a new process to be understood and assimilated by older people. Undoubtedly, this rapidly changing scenario makes it all the more vital to remind education practitioners, policy
makers and funders of the financial literacy needs of older people. This course on *Improving Financial Capability Provision in Later life* identified the three core competencies for developing a financial capability curriculum for older persons - namely, financial planning, problem solving, and decision-making (ibid.). In other words, a financially capable person would possess an understanding of the key concepts central to money management, which include:

- a working knowledge of financial institutions, systems and services;
- a range of skills both general and specific to areas of finance;
- a more positive awareness of the short and longer-term consequences of personal finance decisions, and ability to assess risks;
- attitudes that allow effective and responsive management of financial affairs;
- the confidence to engage in the various financial processes that are encountered on a regular basis.

NIACE, 2008: 2

The specific objectives of the course included the following:

- provide an opportunity and environment for older people to identify and highlight their diverse range of financial capability needs;
- involve groups of older people in reviewing and testing existing financial capability resources in terms of content, presentation, suitability and delivery;
- trial alternative ways of meeting financial capability needs through adapting existing material or by creating new material to deliver to the group;
- investigate the role of key financial organisations, older people’s organisations and education providers in ensuring financial advice and guidance was available...;
- develop ways to use the work through local structures and explore the possibility of an older people’s forum and the embedding of financial capability issues; [and]
- identify funding for future financial capability provision for older people.

NIACE, 2008: 4

The course, which was free and open to everybody over the age of 50 took place over four sessions of two hours each spread over four weeks. Sixteen participants, ten female and six males, took part in the course. The average age of the participants was 65 years old, with the youngest and oldest participants being 61 and 77 years old respectively. Refreshments were available for each session before, during, and even after the session. Specific information about the aim and objectives of each session, based upon NIACE (2006), are listed below:

Session 1 choosing a bank, simple interest rate comparison, multi-factor accounts
(isolating what matters to you)
Session 2  cheque writing, cheque writing practice, cheques - spot the mistakes, paying-
in slips - example, paying-slips – practice

Session 3  statement - running totals, statement - credit and debit, credit cards, secure
online shopping

Session 4  borrowing money using, discuss ways to borrow, understanding bills, ATM
withdrawals and depositing, evaluation of course.

Reflecting the findings of other programmes (e.g. Help the Aged, quoted in NIACE,
2008), it resulted that most older people budgeted and still preferred to budget on a weekly
basis, and cash was the preferred payment method for most goods and services. Moreover, it
was evident that older persons relied heavily on the local post office as both a means of
accessing cash and paying bills. Indeed, only a minority of had set up direct debits to pay their
bills, and many resisted using direct debits, mainly because they were worried about not having
enough money in their account to cover any outgoings. The course was a resounding success,
with many participants voicing their satisfaction with the learning objectives and outcomes:

“We need more similar courses. My husband and I really enjoyed the course. Actually, not only
did we enjoy the sessions but we also found them very useful to our lives. Nobody tells you
anything how the financial system works. They just expect you to invest money without asking
any questions”.

older learner, female, 67 years old

“The only problem with the course was that it was too short. It was fantastic but we
need more sessions. Banks should offer and fund such courses to all their customers, but
especially older persons. It is not enough to be given a brochure or to receive the ATM card with
a list of instructions. We need somebody to answer our questions and queries”.

older learner, male, 77 years old

“This course hit the nail on its head. I do not want to approach friends, neighbours, or even
my children, with questions about [financial] matters. These are very private matters. Why
should I show my bank statement to anybody? Why
shouldn’t the bank tell me how everything works through such courses as these?”. 

older learners, female, 70 years old

Despite the fact that the course never intended to change the surrounding financial context in which older persons are embedded, during the final session many participants claimed to having experienced an improvement in their quality of life:

“My life has changed for the better since I attended the course. Now I feel confident and secure enough to withdraw and deposit money through the ATM machine. I never used the card before. As a result of the course, I do not have to go through an hour bus ride to either withdraw or deposit money or to ask for an account statement”.

older learner, female, 69 years old

“Thanks to this course I now know how to write cheques to settle various payments. I used to take the bust to settle the payments in cash. This was very inconvenient for me as I do not drive or own a car. I am also aware of the various deposit accounts that exist, and as a result, of those which are most suitable to my needs. I am no longer afraid that bank employees will trick me or take for a ride”.

older learner, female, 71 years old

“Last week I bought my first books online. When I received them yesterday, I felt so good, so proud, so independent, so in control. I no longer have to badger my son to get me the books I am interested in. This coming Christmas I plan to buy as much presents from ebay as possible. Stuff is so cheap on ebay. Who knows? I might book a holiday online as well”.

older learners, female, 62 years old
Conclusion

This paper was intended as an invitation to reshaping and reconsidering the ways in which empowerment in later life can be achieved. Through its theoretical argumentation plus case study it shows that CEG is not the only means whereby older learners can experience empowerment. This is because there exists two dimensions of empowerment - namely, structural and subjective. Whilst there is no doubt to the improvement of older people’s lives when social structures are altered in a way that facilitate and improve the lives of older persons, empowerment can also be achieved if older persons are awarded the necessary skills to manipulate their immediate environment to their advantage.

References


Navigating through higher education: mature students in transition

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Abstract
In our paper we are going to focus mature students close to 50 years old. We will present the results of two life histories co-constructed with these mature students, who have entered university in the year of 2010/2011. Our particular interest is to investigate how they have lived this very important transition to higher education.

Keywords: mature students, higher education, expectations, transitions, biography.

1. Theoretical framework
The term ‘non-traditional student’ is useful for describing different groups of students that are in some way underrepresented in higher education (HE) (Bamber, 2008) and whose participation in HE is constrained by structural factors (RHANLE, 2009): disabled or mature students, women, students whose family has not been to university before, working-class or specific ethnic groups who do not fit the so-called ‘traditional’ major group are included, among other, in this category. Non-traditional student is therefore a fluid concept that we should look upon according to the context characteristics; in this case, students from the University of Algarve, in the south of Portugal. In a previous study we tried to understand who these students were. Our preliminary data (Gonçalves et al., 2011) taking as universe students who have entered university from 2006 on, show that even if most of them have between 24-34 years old (45%), there is 32% with 35-45 years old, and close to 20% between 46-57 years old. Their
typical profile: mature students who have a job and a family to take care, low family incomes, low parents educational background (some have low educational levels also), with a high possibility of being the first ones in their family to access university and who spent a number of years apart from formal educational organisations (from 5 to 10 years and sometimes more). It strikes our attention the high numbers of 46-57 years olds who are coming back to higher education. Adults in that age range are not properly young in this specific context of HEI.

The concept of transition is not new; in some countries, like the United Kingdom, there is an extensive set of literature devoted to the several perspectives of transition. Initially these studies were focused in youth, in the sense of understanding the processes through which young people make the transition from school to work. Although this interest started roughly in the 1960s, unemployment and the economic crisis that emerged violently during the 1970s made the issue more visible (Goodwin and O’Connor, 2007). The focus in the youth is understandable, primarily because of the politic consequences it entails in its relationships with dropout and success. It is often argued that smoothen transitions could be the key to foster young adults success, either this ‘success’ is viewed in its purely educational dimension, or also as labour market integration – therefore following the growing centrality of economy into educational values. This approach, therefore, depicts transitions as processes of change – and youth is, of course, made out of a number of transitions. ‘In terms of structure, transitions in a life course designate processes of adjustment to new life circumstances. Usually transitions follow ruptures – modifications of what is taken-for-granted in a person’s life – which can be due to various causes’ (Zittoun, 2007, p. 195). This gives uncertainty a central role which, in turn, highlights that reducing uncertainty is a key-task during transitions. Perspectives of transition ceased to be focused on the individual and the psychological factors that make people more likely to overcome uncertainty. It is clear that while moving from on setting to another people experience a time of intense development, with demands that are socially regulated (Lam and Pollard, 2006).

Last decade’s evolution forced the concept of transition to change. First, because it is arguable that traditional biography do still exist or, at least, they are not certainly the norm. Contemporary life courses seem to have become more complex and lost the fixed contours they may have had (Alheit, 1995). If in a first phase this could call for a bigger attention to adults – not just young people – it seems to be no doubts that mature persons like our own students are today included in the fluid mist of transition. The recent changes in life courses mean that mature adults or older adults are also subjected, nowadays, to a number of as transitions.

Second, in the context of late-modernity researchers have tried to reach a theoretical understanding that integrates structural factors as well as the role of the individuals, using globalization studies to support their frameworks. This contributes to a model of transition where reflexivity is central, a mediating link between structural factors and agency. ‘This dialectic is between cultural habitus and institutional structures, on the one hand, and the transformative power of individual action, on the other’ (Simpson and Cieslik, 2007, p. 399).
Globalization in this context is also very important because it opened doors to a perspective of transition where reducing *insecurity* and managing *risk* seems to be central, despite the dangers we recognise in this theoretical construction. In this sense it is worthwhile to bring Ulrich Beck to this debate, especially when it comes to his conceptualization of the word-risk society. Beck’s (1999) initial ideas depart from the ecological crisis that brought the feeling that environmental menaces were not anymore limited to certain (secure) geographical areas. But Beck’s theory begins precisely away from a sociological dualism between nature and society, depicting a world of ‘manufactured risks’ centred in individualization, danger, and collateral effects. Posterior events and recent societal trends lead Beck to revisit his theory that nowadays includes new axis of analysis (Beck, 2002, p. 41), like the global financial crisis or the threat of global terror networks post-September 11th.

The perception of the world as risk, therefore, seems to extend to a significant number of life dimensions. This macro-context could explain, at least partially, the general tendency of looking at transitions as a problem, a menace, a risk, or just as a changing situation that presents threats that people need to overcome successfully. Whilst we do not deny that this could be the case, there is at least the need to recognise that this conceptualization is incomplete. Transitions need not to be seen as a problem for older adults or groups. Transitions certainly include more than a political perspective that claims for new virtues of management to be overcome in a more efficient way.

Ecclestone (2009) explores how policy and research employ ideas about people’s identity, their capacity for empowered action (agency) and the effects of structural factors on the processes and outcomes of transitions. The author develops extensively these three axes of analysis. For us there are a couple of Ecclestone’s conclusions that might be important for our own research. First, the three perspectives on transitions (identity, agency and structure) ‘not only risk pathologising transitions by depicting them as unsettling, disruptive, daunting, anxiety inducting and risk but also create normative assumptions about how best to manage them’ (p. 23). Second, all the three meanings of transition reinforce concerns about risk, suggesting that everyone needs transitions to be smoothed. The idea that people cannot deal with transitions without help sits with the possibilities of opportunity and change that transitions can create. ‘It also erases the positive effects of difficulty, challenge and overcoming problems and risks attributing ‘problems’ to particular groups so that people become a problem to be supported and managed more effectively’ (Ecclestone, 2009, p. 23).

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1 To deepen this issue, please see, for instance, Beck et al. (2003) and Beck (2003)


2. Methodology

This small study is included in a more wide research project focusing non-traditional students\(^1\). It includes a first phase in which we tried to reach the highest possible number of students from the universities of Algarve and Aveiro, through a parallel survey to students and teachers. Qualitative, in-depth techniques will start to be applied in October 2011, benefitting from the analysis of the questionnaires. At the moment of writing this paper, our scripts of all interviews are being finished and tested. The two biographic interviews of John and Mary are used for the specific purposes of the paper, but also to test the script. John was interviewed three times during July 2011 and Mary two times in the same period (interviews ranged roughly from one hour and a half to two hours).

Our methodological perspective on biography, in this paper, is based in Peter Alheit’s biographical learning and also in his concept of biographicity (Biographizität). For Alheit (1995) the real theoretical provocation within the biographical approach is its insistence on a different way of learning. Although Alheit’s thesis is based in four steps we are only going to underline two: i) a certain trust in the everyday competence\(^2\) of individuals to organise their biographies despite the threats posed by progressive modernisation; ii) the discovery of learning processes within transitions which could provide adult learning with new perspectives. This does not deny the effects of structural factors over people’s biographies, but acknowledges that we can act relatively independently over our own biographies. ‘The learning processes between structure and subjectivity are manifold, but they can only be understood if we do justice to both poles: the structural framework of conditions governing our lives and spontaneous dispositions that we adopt toward ourselves’ (Alheit, 1995, p. 63).

Biographicity (original concept from 1992) means that we can redesign the contours of life within the specific contexts in which we spend it, and that we experience these contexts as shapeable. Within the limits posed by structure we still have the ability to ‘decipher the ‘surplus meaning’ of our biographical knowledge, and that in turn means to perceive the potentiality of our unlived lives’ (Alheit, 1995, p.65). But biographical learning should not be understood only as constructions that assures the individual reflexive organisation of experience. It describes, at the same time, the potentiality to the production and transformation of social structures in biographical processes (Alheit and Dausien, 2007).

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\(^1\) Project PTDC/CPE-CED/108739/2008, Non-traditional students in HEI: searching solutions to improve the academic success, funded by the FCT.

\(^2\) Underlined in the original text by the author.
3. Lost or found in transition? Mary and John perspectives

Mary is 46 years old today and a mother of two boys. The older is studying engineering at the university and the younger is now starting the 10th grade. She was born and lived in Angola, but her family came to Portugal after the 1974 Portuguese revolution and Angola’s independence, to re-build their lives’ from scratch. This was the first big change she lived at the age of 9. Her father used to be a train mechanic and arrived to Portugal too old to be successfully integrated into the labour market and too young to be able to retire. Hence the family had economic difficulties; the adaptation to Portugal was difficult at every levels. Shortly after their arrival Mary started the 5th grade in a public school close to Lisbon area, but two months later they moved and she had to change school. From 5th to 9th grade she knew four different schools.

At home she was subjected to very strict rules, which seemed to combine general traditional values and traditional gender roles. Mary says that the fact that her mother married pregnant had some influence in their desire to control her life and kept the daughter ‘secure’. So she couldn’t ‘do nothing’, not even to go out with her friends – school vacations seemed a torture to her. At the other hand, school space meant a no-control zone, a socialization realm that functioned as her natural refuge. Although Mary cannot be considered as a model student when it comes to success – she repeated the 8th grade twice – she always lived school as a central space of freedom. At the 9th grade she was already 18 years old. Mary knew back then her boyfriend – he was in the army – that later on become her husband (Francisco). After finishing the 9th grade she abandoned school and started working. It is clear that Mary blames, at least partially, her father and mother for this early school abandoning: there was not the will to create the necessary conditions for her to stay at school, and they resigned easily to her new condition of trying to enter the labour market as a non-qualified worker.

For 5-6 years Mary worked in small temporary non-qualified jobs. Basically she accepted what was available. In 1989 (she was 24) she got her first job with a signed formal contract, in a public school in the area of Lisbon. Her functions were basically cleaning and to monitor children during the classes’ breaks. She married and went to live also close to Lisbon, but in the opposite extreme of the urban area. This meant she had to cross the entire city to go to work in five different public transportations – spent two hours and a half to get there and another two hours and a half to get back. Meanwhile Francisco got a job as a prison guard, more or less one hour away from Lisbon. This was a difficult time for them.

Mary did this job in different schools until 1996, when she finally got the chance to change to administrative functions, also in public schools. Mary has no shame of her job: she had good relationships with the children (better with the ones considered to be ‘bad students’) and teachers. But she was tired of cleaning. In this sense, to change to administrative functions was a very important fact for her. ‘I used to say, my pen shifted from the broom to the computer, so as you can see...’ Although this change was difficult in the beginning, after some training
courses and the help of her boss, she became comfortable in her new functions. At some point she change house again and went to live close to Francisco’s work and later on – after staying some time working, again, far away from home – Mary managed to work in a school close to her new house. It was the year of 2000 Mary had 35 years old, two sons and some stability. Three years later, a new change: Francisco moves to be a prison-guard in the small city of Silves, in the region of Algarve (south of Portugal) and Mary was able to find a job in the same prison, doing administrative work.

In the year of 2007 it opened in Silves a centre for recognition of prior learning (RPL). Strongly encouraged by Francisco, Mary spent one year and a half in this centre and in 2010 she had the 12th grade. This was very important, because it gave her the opportunity to re-gain some habits of studying, researching, etc. Also the adult educator, who was responsible for her at the RPL centre and, again, Francisco, were both determinant in Mary’s decision to apply to the University of Algarve, through the new form of access for people with more than 23 years old. Economically speaking is was a difficult decision, implicating the payment of two university fees (her older son begun then his first year). In September 2010 Mary has begun the bachelor of Social Education at the university – 27 years after she abandoned school – in the evening courses.

Mary’s expectations had to do with being aware of the fact she was not 20 years old anymore, doubts in her abilities and the fear of not being able to keep up. Her first contact with the academia was during the mandatory interview that is part of the access process. Mary was surprised by the informality of the two professors who interviewed her. Also classes turned out to be completely different from what Mary remembered from school, demanding much more of autonomous individual / group research. At the beginning it was difficult: Mary realised she had not the same ability to memorise (‘I have to understand, or else there’s no point’) and also that she had to ‘battle’ more than her young colleagues, taking more time to study. When asked on the differences between mature and younger students, Mary claims mature students to have more sense of responsibility, organisation and workings method’s. The only advantage she sees in young students is their ability to memorise. But again and again she stresses the importance of responsibility in various ways:

“I’m not there [at the university] to waste time, because my time is precious, right? I’ve got a family, I work and I want to do this, if possible, in three years. I’m not there to waste time, so for me that’s central and I need to skin me-off to do it. And I’m not there to lose money because it’s my money, it’s not my father and my mother paying me to go there... that’s what happens with young kids, someone pays for them to go there”.

The group of students that Mary is a part of has about 40 students with ages between 19 to 51 years old, but the great majority are mature students. Mary claims that the better positive surprise of this first academic year was indeed the relationships they are able to build. It is a strong and united group that does not excludes no one. They share their notes, help one another
when difficulties appear – either these are strictly academic or a more generic matter of psychological support. Also she claims that older students are the ones who lead and steer this type of relationships, which seem fundamental in more than one way.

Coming back to HE implicated family support and changes in the everyday management of a number of issues. Francisco assumed the responsibility of supporting their son in his studies or everything it relates to his school, the daily meals and similar arrangements – Mary arrives at home around midnight or sometimes later, and most of week-ends are dedicated to study. But when Mary talks there is never the feeling that this was a problem, as she is aware that the family supports her efforts. So, the bigger difficulties Mary had in this transition were managing time (‘time is a terrible problem’), especially because of the distance between her home place and the university (between 45 minutes and one hour). Academic success was not a problem. After the first weeks and a couple of minor problems things are stabilised. Mary did all the 12 courses (6 each semester) and her grades improved in the second semester. Finally, Mary claims that university printed some significant personal changes:

“I think that this degree [social education] made me look to certain situations with a new look […] I didn’t even knew the most part of the humanitarian civil society organisations, nothing. I didn't know what the European year of volunteering was. These are things that make you look to things with a different look...”

**John** is 49 years old today and a father of a daughter and a son. He lived in a small village in the central zone of Portugal until the age of 12. But soon after the Portuguese revolution of 1974, his father (worked at a train company) decided to move to a village close to Lisbon – he was afraid that someone occupied a house he was building there. John’s father worked at Lisbon and stayed with the family only two days per week. This change was determinant for John, who left her family and friends behind, as well as the kind of relationships typical of small places, characterised by proximity. His new friends, older than him, were mainly drug addicts and some were drug dealers, but surprisingly or not, always advised John to be out of it. Despite the difficulties in the beginning, John claims that this change was fundamental for him to grow and increase his autonomy. Three years later, in his 9th grade, John changed to a school that was important for him. Even today he remembers his friends, teachers and staff. His father was, meanwhile, already working closer and staying with the family. With 15 years old, John started to work during the summer in a factory (tomato can), along with his friends.

John left one course behind in the 12th grade and he was forced to join the army. This was a second big change in his life. He spent 16 months in the army. Although this was not a good experience, on the other hand it opened the doors for him to run, after that compulsory period, to all the branches of security corps. He joined then the corps of revenue officers, but he was placed in the islands of Açores (Terceira) for two years – another big change in his life. John
and her girlfriend decided to marry. Both decided to finish secondary school in Açores (evening classes), but a surprised was waiting: the school did not give them equivalences (both missed just one course to finish the 12th grade) and so they had to go back to 10th grade and re-start again – which they did. Luckily for John, his First-Sargent managed flexible schedules for everybody who wanted to study. After the two years they went back to the continent. As John did not have then conditions to go on studying, her wife entered university and she was able to get her first degree.

After a couple more changes in his place of work (and a couple more years), it was John’s time. He applied to the University in the ancient regime Ad-Hoc, where people had to make a rigorous written and oral examination to access HE. He started, with 31 years old, a bachelor on management of human resources and labour psychology, but never finished. The guard’s branch he belonged to was extinguished in 1993. He managed to enter then the service of foreign and frontiers and later on made the course to be promoted to inspector. And then he was sent, again, to the Açores, this time to an even smaller and different island called Santa Maria (5.000 inhabitants). Her daughter was about 4 years old. John spent the first year alone in Sta Maria and then her wife and daughter joined. This time the experience of staying in Açores was very positive: not only a new baby was born there, as they had a rewarding relationship with the people. Also their professional experiences were very good. They stayed in Santa Maria for 6 years. After that they came to the Algarve by their own choice – making this change the easiest of them all. John talks of change as a structural dimension of his life.

Since the first time John entered HE he though one day he was going to come back. The fact that her daughter (20 and already in university) and son (14) are more autonomous now was important to define the moment. John’s motives are not professional (the bachelor is not going to influence his professional path) but mainly personal. He entered HE (also Social Education) with high expectations and the natural fears that come from comparing his age with the younger colleagues. Also the fear of being seen by the others as a ‘cop’ or a ‘snitch’ was central. In the beginning, John established formal social relationships with his colleagues: as he expected, the ‘snitch’ label was a difficult one to overcome. It was only in the second semester when a course on ‘Theatre of the Oppressed’ allowed a huge improvement of the social relationships between students, along with a two-day field trip. John recognises he also changed, ‘adopting a younger posture’, including to change his way of dressing, now more informal. He values immensely people’s ability of accepting the difference of the other, considering that a social educator must has this type of posture in life. And the creation of this kind of collective spirit was fundamental for the students to build a very, strong united group who is capable of helping the ones who feel difficulties of some kind whenever is needed. When comparing mature/ younger students, John claims the younger students are more able to memorise, have more skills when it comes to computers, but that they lose in all the remaining dimensions. He considers that mature students have a greater life experience, general-cultural knowledge, a better ability to dialogue and elaborate on scientific matters, and a greater ability to make relationships between issues and to
build on that. To be older is therefore an enormous advantage (that’s why, John says, older students got better grades than the younger ones).

Besides this good relationship between the students, John claims to be positively surprised with the kind of relationships and posture – more informal, friendly and opened to dialogue – built by the professors:

“It is not only to know the student’s names, it is also the posture, to be available, that we are able to pose questions, the openness, the openness the professors demonstrated with no exceptions [...] Every professor showed to be opened to help us, to dialogue and that was, for me, the enormous difference regarding my former days of student and that created an enormous expectation [...] And I feel that professors look at us, the people of my age, with respect and affectionately…”

When asked on how HE affected the family balance, John explains all the details that naturally change and affected family. But there is always the feeling this was a ‘good’ change:

“I would dare to say it was a positive change. For the commitment that everybody had so that I could begin this life-project, its pride, I feel my daughter and son take a pride in me, I feel my wife takes a pride in me, I feel my father and mother take a pride in me”.

John speaks a lot of the changes that HE triggered on him. Some of them are personal. He clearly opposes his former ‘I’, much more serious and rigid, to a new younger and joyful ‘I’, always joking, much looser and frequently joining younger colleagues to beer and socialise at night. But mainly he claims HE to open-up his horizons and mentality, to help him to build a more open version of reality and to change the ways he see things at general. Finally, John says to have developed his abilities to approach new issues, to research, write confidently and with efficacy, etc. and also that these skills help him in his job.
Conclusion

The short biographies here presented give us room to highlight some points to debate. First, an overview of John and Mary’s biography depicts two persons who seem to be in transition since they were young. Both changed several times their places of life and work, and face difficulties in several dimensions of their lives (especially Mary). Analysing this set of huge changes, it is no wonder that for both the transition for HE was not a big problem. Quite the opposite, they claim this transition to be one of the smoothest of their lives.

The second point is, in a sense, a consequence of the first. To both Mary and John the transition to HE was not seen as a huge threat or a risk. It presented challenges and opportunities, mainly. Each in their own way acknowledges the difficulties in this path. But when they speak about such difficulties, there is always a discourse that underlines the positive aspects of the transition and the sense of being pride of the changes they are able to trigger for their lives.

Third, we are looking to biographies where structural factors that constraint people’s lives are very noticeable. Mary and John spent a great deal of their lives fighting to overcome some of the effects posed by such factors. Nevertheless, it seems undeniable they both have a certain degree of control and autonomy over their own biographies. Moreover, there are important biographical learning processes included in a number of transitions of their lives. Looking only for the HE transition, it seems that HE is promoting significant changes that can have a transformative effect. As they entered university recently, there is an open learning process ahead of them and numerous changes still operating. But the first year of this transition process seems fundamental to open up the possibilities of their unlived lives (cf. Alheit, 1995). Both Mary and John are aware of transformative potentialities of their unlived lives – although, clearly, they prospect different things.

Finally, it is very important to make a reflection on the age factor. Common ideas that circulate regarding higher education claim younger students to be well prepared, to have time and space to develop their skills – despite all the remaining structural factors that we do know to have relationships with academic success (social class, gender, etc.). By the contrary, non-traditional students have been a ‘problem’, among other things, because drop-out rates are high and academic success is low. Time management, difficulties to join work and studies, or difficulties among the family have been pointed out as factors affecting mature students success. The importance of these two biographies here presented is, precisely, to show that this is not necessarily the case. Both Mary and John have a very positive perspective on the advantages of age, experience, responsibility, and went as far as stating their younger colleagues to be disadvantaged. Their subjective learning processes during this transition clearly depict them as found in transition – not lost.
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Profiles of ageing in the South of Portugal: education and cognitive functioning in elderly persons living in institutionalized and community contexts

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Abstract

The ageing of the human population is a truly global phenomenon at present times and it represents a challenge to the 21st century nations and societies. This phenomenon led to an exponential growth of research on ageing. For its scientific and social importance, the criteria and conditions for determining positive patterns or profiles of ageing is an issue highlighted in gerontological research.

The positive view of the ageing process that embraces the concepts of active, optimal or successful ageing is the approach that underlies the PhD research which is being carried out on a sample of older adults living in the Algarve, in southern Portugal. The basic theoretical framework departs from the perspective of developmental psychology of life-span and the model of selection, optimisation and compensation for optimal ageing (Baltes & Baltes, 1990; Freund & Baltes, 2002).

The ongoing PhD research was designed as a cross-sectional study of an intentional sample of elderly persons. The first aim is to characterize the strategies of adaptation to ageing, functional capacity, cognitive functioning and psychological well-being, and assess whether the relations between them allow designing successful, normal, or inadequate profiles of ageing. A second aim is to understand the importance of a set of socio-demographic factors that influence the
trajectories of ageing as gender, social networking, income and educational level and study the role of ecological factors as living in the community / living in an institution and living in urban / rural settings.

The study that will be presented is a first step in the analysis of empirical data collected in the sample of elderly people, analysing the relations between educational level, cognitive functioning and living contexts of the subjects. To reach the participants for this study it was asked the cooperation of the staff of local community centres, day care centres and residential care homes in three cities near the coastline and in small villages located in rural areas. Individual interviews were conducted, ranging between 50 to 75 minutes, to collect socio-demographic data and apply the instruments. Research sample consists of 156 subjects (65 to 97 years). The majority of subjects are women (66%) and the mean age of the total sample is 80.7 years. A considerable number of subjects (49) are 85 years old or over.

Longitudinal research examining cognitive development has revealed that cognitive abilities vary in their developmental trajectories across adulthood (e.g., the Seattle Longitudinal Study: Schaie, 1996; the Berlin Aging Study: Smith and Baltes, 1999). Some research suggests that the benefits of early formal education extend into adulthood. In spite of the existing debate regarding the extent and the mechanisms by which early educational benefits continue to manifest in later years, numerous cross-cultural studies have found greater levels of formal education to be associated with decreased risk of cognitive impairment in later life (Willis & Margrett, 2001). Therefore, the results of the study will be discussed in relation with key scenarios offered in the literature and relevant approaches concerning the role of continuing learning in the development of positive profiles of ageing.

**Keywords:** successful ageing; optimal cognitive functioning; educational level; life-span perspective; old adult education and learning.

**Introduction**

The ageing of the human population is a truly global phenomenon at present times and it represents a challenge to the 21st century nations and societies. This phenomenon led to an exponential growth of research on ageing. Given its scientific and social importance, the criteria and conditions for determining positive patterns or profiles of ageing is an issue highlighted in gerontological research.

The positive view of the ageing process that embraces the concepts of active, optimal or successful ageing is the approach that underlies the PhD research, which is being carried out on a sample of older adults living in the Algarve, in southern Portugal. The basic theoretical framework departs from the perspective of developmental psychology of life-span and the model of selection, optimisation and compensation for optimal ageing (Baltes & Baltes, 1990; Freund & Baltes, 2002).
The region of the Algarve shows huge differences between the coastline where population in the urban areas grows, and the inland rural areas, in some cases very isolated, which frequently have high ageing indexes. This general scenario, with an elderly population with very different economic and social conditions, frames the ongoing PhD research designed as a cross-sectional study of an intentional sample of elderly persons.

The first aim of the research is to characterize the strategies of adaptation to ageing, functional capacity, cognitive functioning and psychological well-being, and assess whether the relations between them allow designing successful, normal, or inadequate profiles of ageing. A second aim is to understand the importance of a set of socio-demographic factors that influence the profiles of ageing as gender, social network and educational level and study the role of ecological factors as living in the community or in an institution and living in urban or rural settings.

The present study is a first step in the analysis of empirical data collected in a sample of older adults. Its purpose is to assess the cognitive functioning of participants, screening for cognitive impairment and examine the relations between the cognitive status of the subjects and a number of selected variables including educational level, age, physical activity and living contexts of the subjects.

**Cognitive functioning as a criterion of successful ageing**

The conceptualization of successful ageing is not new (e.g. Havighurst, 1963), but only in the last decades of the twentieth century has become a guiding theme in gerontological research. For P. B. Baltes and M. M. Baltes (1990) successful ageing can be defined, on a very abstract level, as the simultaneous maximization of gains and minimization of losses related with the ageing process. They listed a more extensive set of criteria including longevity, biological and mental health, optimal cognitive functioning, personal control and life satisfaction. An essential characteristic of successful ageing is multidimensionality, and only multiple assessments in several life domains can contribute to differentiate normal and successful ageing profiles (Freund and Riediger, 2003). There is also evidence of the strong connection between functional ability, intellectual functioning, and social involvement in the more positive and desirable profiles of old age (e.g. the Berlin Ageing Study: Mayer et al., 2001). The importance of good cognitive functioning in the process of ageing successfully was early highlighted from different perspectives and theories (e.g. Rowe & Kahn, 1987; Baltes & Baltes, 1990).

Life-span theory of intellectual development acknowledges that, as individuals age, a series of biological changes underlie the progressive degradation of the nervous system and the development of cognitive inefficiencies. However, life-span researchers sustain that the increment of age related losses does not imply that there is no opportunity for growth at all in the second half of life in some domains (Baltes, Staudinger, & Lindenberger 1999). This perspective emphasizes that cognitive plasticity is preserved among healthy older adults and can be activated
through coping strategies and socio-cultural mechanisms. At present, there is a strong consensus that cognitive enrichment activities, maintaining a lifestyle that is intellectually stimulating, having meaningful social engagement and physical activity predict better maintenance of cognitive skills and it is associated with a reduced risk of developing Alzheimer’s disease in late life (Hertzog et al., 2009; Fernández-Ballesteros, 2008).

**Education and cognitive functioning in older adults**

Longitudinal research examining cognitive development has revealed that cognitive abilities vary in their developmental trajectories across adulthood (e.g., the Seattle Longitudinal Study: Schaie and Willis, 2005; the Berlin Aging Study: Smith and Baltes, 1999). A substantial number of longitudinal studies that have examined the effects of education on the cognitive vitality of older adults showed that low levels of education was the strongest predictor of cognitive decline in measures of verbal and nonverbal memory, conceptualization and nonverbal abilities, but not speed of processing (Kramer et al. 2004). In spite of the existing debate regarding the extent and the mechanisms by which early educational benefits continue to manifest in later years, numerous cross-cultural studies have found greater levels of formal education to be associated with decreased risk of cognitive impairment in later life (Willis & Margrett, 2001). A neuropsychological research comparing Portuguese illiterate and literate Alzheimer’s patients performance on cognitive tests with the performance of healthy people illiterate and literate concluded that there is a greater variability among illiterate people, and that their cognitive functions are more severely altered with dementia (Guerreiro et al., 1996). With a 55.1% rate of illiteracy among the elderly (INE, 2002), the Portuguese policy makers cannot ignore the negative implications that this high value of illiteracy has on mental health and quality of life of older citizens.

From the perspective of life-span development, early education provides the access to more educational and career opportunities during the lifetime, thus facilitating better access to social and health care resources, which, in turn, contribute to the maintenance of cognitive functioning in later life (Willis & Margrett, 2001). Moreover, as Kruse and Schmitt (2001) pointed out, education and learning is associated with the development of a sense of control in one’s own life, not only in young people but also in adulthood. In that sense, even in old age, “adult education can contribute to healthy ageing by motivating health producing behaviours and lifestyles” (Kruse & Schmitt, 2001, p.143).
Method

Participants

The cooperation of the staff of local community centres, day care centres and residential care homes in three cities near the coastline of Algarve and in six small villages located in rural areas was asked in order to reach the participants for this study. Two psychologists conducted individual interviews to collect socio-demographic data and apply the instruments with the informed consent of participants and in private places.

<table>
<thead>
<tr>
<th>Table 1. Socio-Demographic Characteristics of Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>(N=156)</td>
</tr>
<tr>
<td>Characteristic</td>
</tr>
<tr>
<td>Sex</td>
</tr>
<tr>
<td>Women</td>
</tr>
<tr>
<td>Men</td>
</tr>
<tr>
<td>Age Group</td>
</tr>
<tr>
<td>65-74</td>
</tr>
<tr>
<td>75-84</td>
</tr>
<tr>
<td>≥85</td>
</tr>
<tr>
<td>Marital Status</td>
</tr>
<tr>
<td>Single</td>
</tr>
<tr>
<td>Married</td>
</tr>
<tr>
<td>Divorced</td>
</tr>
<tr>
<td>Widowed</td>
</tr>
<tr>
<td>Professional Qualification</td>
</tr>
<tr>
<td>Low qualification</td>
</tr>
<tr>
<td>Medium qualification</td>
</tr>
<tr>
<td>High qualification</td>
</tr>
<tr>
<td>Educational Level</td>
</tr>
<tr>
<td>Illiterate</td>
</tr>
<tr>
<td>1 to 11 years</td>
</tr>
<tr>
<td>&gt;11</td>
</tr>
</tbody>
</table>
As we can see in Table 1, 156 elderly persons (range 65 to 97) were studied, with a mean age of 80.4 years and a standard deviation of 7.2 years. Age group 75-84 years is the most represented in the sample and the very old with 85 or more years amounts to one third of the sample. The majority of the subjects are women and widowed. Regarding professional qualifications, the majority has low qualifications and only a small part of the subjects have high professional status. Concerning the educational level, there is a high rate of illiteracy and the majority of the subjects have 1 to 11 years of formal education. In this educational category, the largest group has an elementary school degree (41%), corresponding to 3 to 4 years of instruction at the time of the dictatorship, and 20.4% of the subjects have studied some years in a secondary school or have a high school diploma. Only a small number of participants have more than 11 years of formal education.

**Table 2.** Ecological and Psychosocial Characteristics of Participants

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Home Setting</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Urban area</td>
<td>78</td>
<td>50</td>
</tr>
<tr>
<td>Rural area</td>
<td>78</td>
<td>50</td>
</tr>
<tr>
<td><strong>Living Arrangement</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Independently in their home</td>
<td>50</td>
<td>32.1</td>
</tr>
<tr>
<td>In their home with everyday care</td>
<td>52</td>
<td>33.3</td>
</tr>
<tr>
<td>Residential care home</td>
<td>54</td>
<td>34.6</td>
</tr>
<tr>
<td><strong>Living with others or alone</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>With others</td>
<td>109</td>
<td>69.9</td>
</tr>
<tr>
<td>Alone</td>
<td>47</td>
<td>30.1</td>
</tr>
<tr>
<td><strong>Number of hours per day alone</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>≥8 per day</td>
<td>49</td>
<td>31.4</td>
</tr>
<tr>
<td>&lt;8 per day</td>
<td>107</td>
<td>68.6</td>
</tr>
<tr>
<td><strong>Have a confidant</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>139</td>
<td>89.1</td>
</tr>
<tr>
<td>No</td>
<td>17</td>
<td>10.9</td>
</tr>
<tr>
<td><strong>Hours of physical activity per week</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0 hours</td>
<td>28</td>
<td>17.9</td>
</tr>
<tr>
<td>&lt; 2 hours</td>
<td>29</td>
<td>18.6</td>
</tr>
<tr>
<td>2 to 4 hours</td>
<td>22</td>
<td>14.1</td>
</tr>
<tr>
<td>&gt;4 hours</td>
<td>77</td>
<td>49.4</td>
</tr>
</tbody>
</table>
What the home setting and living arrangements of the participants concerns, as we can observe in Table 2, the sample is equally distributed between urban and rural areas and the majority of the participants live in the community (65.4%) with everyday care or they live on their own in their home, and the remaining participants live in institutions such as residential care homes. As expected, subjects who live in the community on their own are younger \((M = 76.82, SD = 5.58)\) than the older ones living in their home with everyday care \((M = 82.38, SD = 7.38)\) or in residential care homes. In relation to their social relationships, the majority lives with other people, they stay less than 8 hours alone and they have a person they can trust and who serves as a confidant. Almost half of the participants have reported that they do more than 4 hours of physical activity per week.

**Instruments**

We used some sections of The Biopsychosocial Assessment Method (Botelho, 2005), which is a standard questionnaire in Portugal for the assessment of functionality in older individuals, for the socio-demographic data-collection and psychosocial characteristics of the participants summarized in Tables 1 and 2.

We applied the Portuguese version of the Mini-Mental State Examination (MMSE) (Guerreiro et al., 1994) in order to assess the cognitive functioning of the participants and to screen for cognitive impairment and dementia. Since its development (Folstein et al., 1975), MMSE has become a widely used cognitive screening instrument for cognitive impairment and dementia in both clinical and research settings, due to factors including its brevity and straightforward administration. Its quotation can vary from zero (0) points up to thirty (30) points. The MMSE has 11 questions and includes the following cognitive domains: orientation (10 points), registration (3 points), attention and calculation (5 points) memory (3 points), language (8 points) and constructive praxis (1 point). An MMSE score \(\leq 23\) is generally accepted as indicating cognitive impairment and is associated with the diagnosis of dementia (Small et al.1997).

Several studies pointed out that education and cultural and socioeconomic background can cause a considerable bias in the MMSE's scores (Ponton, & Ardila, 1999). Guerreiro et al. (1994) in the Portuguese version set different cutoff scores according to the educational level of subjects for differentiation of individuals with intact cognitive function from patients with dementia. Thus, the authors consider that cognitive impairment exists in the Portuguese population when the MMSE score is \(\leq 15\) for the illiterate, \(\leq 22\) points for subjects with 11 or fewer years of education and \(\leq 27\) points for people over 11 years of education. In our study, we also recorded education levels and illiteracy using the same cutoff scores to select the participants with and without cognitive impairment.

As the present study can be considered a first approach in the analysis of empirical data collected in the sample of older adults, we conducted descriptive statistics with SPSS.18
statistical software to examine the frequency distribution, calculate percentages rates and correlations. To conduct bivariate correlations between the variables and MMSE scores, we used the non-parametric statistic Spearman’s correlation coefficient rho (\( \rho \)) and the coefficient of determination “R Squared” as a measure of the amount of variability in one variable that is shared by the other (Field, 2009).

### Results and Discussion

**Table 3.** MMSE mean scores, standard deviations in sample subgroups and correlations found between variables and MMSE scores

<table>
<thead>
<tr>
<th></th>
<th>N</th>
<th>M</th>
<th>SD</th>
<th>( \rho )</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total sample</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Without Cognitive Impairment</td>
<td>140</td>
<td>25.16</td>
<td>4.26</td>
<td></td>
</tr>
<tr>
<td>With Cognitive Impairment</td>
<td>16</td>
<td>18.44</td>
<td>2.96</td>
<td></td>
</tr>
</tbody>
</table>

**Variables**

**Educational level**

- Illiterate: 44, 19.32, 3.60
- 1 to 11 years: 103, 26.28, 3.20
- >11: 9, 28.89, 1.69

**Age group**

- 65-74: 36, 26.86, 3.39
- 75-84: 68, 24.34, 4.62
- ≥85: 52, 22.98, 4.76

**Professional qualification**

- Low qualification: 96, 23.24, 4.75
- Medium qualification: 50, 25.90, 3.72
- High qualification: 10, 29.10, 1.59

**Living arrangement**

- Independently in their home: 50, 26.52, 4.00
- In their home with everyday care: 52, 23.65, 4.61
- Residential care home: 54, 23.35, 4.62

**Hours of physical activity per week**

- 0 hours: 28, 22.43, 4.81
In Table 3, we summarize the main results of our study. In the first section, we present the total MMSE mean score and standard deviation of the total sample followed by MMSE mean score and standard deviation of the subjects without and with cognitive impairment. In the second section we present the MMSE mean score and standard deviations in sample subgroups and Spearman`s correlations found between the variables of our study and MMSE scores.

As we can observe in the first section of Table 3, results showed a 10.3% (n=16) prevalence of positive cases with cognitive impairment. As expected, given the small number of positive cases, no significant relationships were found between cognitive impairment and the categorical variables showed in Table 3. Only age, measured as ratio variable is significantly related with the prevalence of cognitive impairment ($\rho = .17, \rho < 0.05$). In general, in our sample cognitive impairment is higher in very old people ($M = 84.38, SD = 6.06$), living in urban areas in their home with everyday care or in residential care homes.

Although our research is based on an intentional sample, results have a few points of contact with other studies in the field. A study with a nationally stratified sample of 2672 individual’s ≥ 55 years with the Portuguese version of MMSE observed a 4.6% prevalence of cognitive impairment in Algarve and a national average of 6%, worse in 75 year-old or above, in women and in old people living in the Northern Region of Portugal (Oliveira et al. 2010). The Portuguese version of MMSE was also used to assess cognitive impairment in a sample of 1266 old community-dwellers in Portugal, mean age 70.3 years, standard deviation 8.7 years. Findings showed a 9.6% prevalence of positive cases with cognitive impairment higher in women, older people, widows (ers), and in people with difficulties in basic and in instrumental activities of daily living (Paúl et al. 2010).

In all the study variables, it was in the educational level categories that the largest relationship with MMSE performance was found. As we can see in Table 3, the MMSE mean score of illiterate participants is much lower than the mean score of participants with 1 to 11 years or more of education. The magnitude of the difference observed in this variable between MMSE mean scores of illiterate and literate participants is greater than all others verified in the study. Even the differences in MMSE mean scores between participants with and without impairment have such magnitude. As expected, educational level of the participants was significantly related to its MMSE performance ($\rho = .67, \rho < 0.01$). We estimate the coefficient of determination “R Squared” as a measure of the amount of variability in one variable that is shared by the other (Field, 2009): $R^2 = (.67)^2 = 0.448$. Hence, we can conclude that variability in
educational level accounts for 44.8% of the variability in MMSE score. This main finding of the study seems corroborate the strong intercorrelation between education and cognitive functioning in old age that has been sustained in different fields of research, ranging from sociological studies in adult education to gerontological sciences.

The other correlations found in our study are not as significant as those seen in relation to the educational level. After educational level, it is the variable professional qualification (Table 3) that presents a more meaningful relationship with the participants' performance in the MMSE ($\rho = .38, p < 0.01$), with the variability in professional qualification accounting for 14.9% of the variability in MMSE score. In fact, it is in this small subgroup of the sample where a higher mean in MMSE was found followed closely, as expected, by the mean obtained in the small subgroup with more than 11 years of education. The third subgroup with the highest scores in MMSE was the younger elderly subjects with 65-74 years (Table 3). This result is, in contrast to the result obtained by the subgroup of older people, with 85 years or more, the one which got the third worst MMSE mean score after the participants with cognitive impairment and the illiterate subgroup. In our study, a negative correlation was observed between subjects’ age and MMSE score ($\rho = -.36, p < 0.01$) with the variability in age accounting for 13% of the variability in MMSE performance. The relation between advanced age and low performance in MMSE is well established in literature (e.g. Berroa et al., 2009) and age related decline in cognitive functioning, especially in the fourth age, is an evidence widely reported in the literature (e.g. Baltes et al., 1999).

Although smaller than in the other variables, we also verified in our findings significant relationships between the variables living arrangement and hours of physical activity per week and MMSE performance of the participants (Table 3). The elderly persons living independently in their homes had higher MMSE scores than those living in the community with everyday care or those living in residential care homes. The participants with more than 4 hours of physical activity per week also had higher MMSE scores than those with less activity level per week. The importance of environmental domains in the development of positive profiles of ageing, including housing and neighborhood resources, social support, and formal service support have been emphasized by environmental gerontologists. This approach was used in the ENABLE-AGE project, a European study conducted between 2001 and 2004 to explore the influence of objective and subjective aspects of the home environment on healthy ageing. The need to promote independent living and enable older people to stay in their home for longer is one of the key recommendations of the ENABLE-AGE project (Cross-National Report M12, 2011). The importance of regular physical activity and exercise for elderly persons has also been emphasized in numerous observational studies and intervention programs among older people, pointing to great benefits in cognitive, emotional and social functioning (WHO, 2003; Phillips, Kiernan & King, 2001).
Conclusion and Implications

As already mentioned the present study is just a first step within the context of an ongoing PhD research. The different conditions of elderly population of the Algarve are reflected in the analysis of empirical data collected in an intentional sample of older people. As we observed, the sample had subgroups with different characteristics in terms of age, education, socio-economic status, living arrangement, geographical area of residence and levels of formal and informal support.

In our study, we accessed the cognitive status of the participants with the Mini Mental State Examination (MMSE) finding a 10.3% prevalence of positive cases with cognitive impairment. Given the expressive number of very old, illiterate and poorly educated participants in the sample, this prevalence rate does not seem inappropriate in relation with prevalence rates found in other studies with Portuguese elders. Concerning the cognitive status of the participants without cognitive impairment, and in spite of the differences observed between the subgroups, in general, the results show a MMSE mean score suggesting an adequate cognitive functioning in the majority of the participants. The results also show significant relationships between the cognitive status accessed by the MMSE and educational level, professional qualification, age, living arrangement and activity level of the participants. The relationship verified between educational level and cognitive status of the participants was the largest correlation found in the study, pointing in the same direction of several other studies that demonstrated the considerable bias in MMSE's scores caused by education, cultural and socioeconomic background. In our perspective, in spite of this limitation, shared indeed by most assessment tools of cognitive functioning, MMSE seems to have also positive aspects, and among others, it has been able to detect illiterate participants with high cognitive status.

As a first approach in the study of a sample of older people living in Algarve, the present research has several limitations, among others the possible bias of some results due to lack of representativeness of the sample, to limitations of the instruments or the absence of inferential statistics. Otherwise, from our point of view, several implications of this study are related with the need of integrated policies and approaches at regional and community level able to meet the needs of a very differentiated population as the elderly. In a time of scarce resources and social and economic crisis it is necessary to optimize all available means with the aim of facilitating normal or successful ageing profiles. Continuing education programmes interconnected with the specific needs of elderly persons and with the support of local authorities is an adequate strategy to prevent cognitive decline and enhance the continuous exercise of social practices in the elderly.
References


What are the main risk factors for disability in old age and how can disability be prevented? [WHO Regional Office for Europe’s Health Evidence Network (HEN), September 2003]

Health education in a war veterans intervention

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Abstract

In this dissertation, we present our critical opinion about some theoretical content, and the application of it, in a practical project of health education with veterans from the war of the ultramar in the Portuguese Association of the War Veterans.

We will make a comprehensive approach by different themes, from a primary focus on the clarification of terms such as education and health, to the understood perception of pedagogy / community intervention.

Moreover, behind those general definitions, our goal is to describe the concrete practical approach of the community intervention in a context like health. In that sense, we will consider the methodological attitudes that allowed the participation of the subjects and their self-consciousness.

The community project is here understood as a source of coordination between the needs presented by the population, the proposed answers and their willingness to change. The educational project in this community is understood as a project to promote health because it enables the understanding and progressive integration of individuals around their community, better understanding their deepest needs, often unknowned by themselves.

In this sense, we presented a special focus in the Empowerment model, as an health education model, which is an intervention practice oriented to the individual’s social integration.

The educator’s role, and thus the health educator, allows the mediation and is the driving force of the progress by giving information and formation (training) to the individuals.

The health education, between the community project practices, can be understood as the central theme of this work, behind the materials that we have.

The developed activities benefit notions as in good lifestyle for this population, because they have huge health problems associated with the war trauma. In fact, we had to develop various areas
such as vocational orientation, professional insertion, training directed, working with life histories, musical education and social animation.

**Keywords:** health, education, empowerment, community project, development.

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1. **The war veterans**

The Portuguese Association of War Veterans (APVG) is a Private Institution of Social Solidarity (IPSS), founded by public deed on 18 March 1999 by the initiative of a group of former soldiers. This association is oriented particularly to colonial war veterans from all branches of the armed forces, who provided their services during the colonial war in the Portuguese colonies.

The founders of APVG believe that a significant part of the Portuguese population which returned from the war, after some years, suffered from sequels of this same war, in what is concerned to personal and social abilities. Subsequently, it was discovered a vast variety of diseases and psychiatric traumas, as well as other diseases specifically related to the physical well-being at various levels, in addition to their own body sub-sequences.

According to this setting, and perceiving that the majority of this audience is now retired, unemployed or with early retirement age, we understand that was urgent the awareness and implementation of health education interventions, contributing to social and community development.

Concerning our experience, the war veterans who passed through our centre are people with low or non-existent education who live, or survive, at the expenses of family solidarity or government subsidies.

Through this health education program focused on war veterans, we provided to these individuals the possibility of search for the long forgotten dreams and enable rehabilitation and integration in a society in constant change.

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2. **Health education and development of war veterans**

Specifically we understand that education and health are presented, in this context, as two pillars of the educational intervention project.

It is clearly sensed the inter-relationship between the consciousness of lifelong education and health because through the acquisition of knowledge by daily learning (formal, non formal and informal) and training, the individual can ultimately learn about yourself and on their health. In this sense it is said that education is understandable only when there are health conditions in the individual himself (cf. Antunes, 2008: 47).
The role of education is to provide a mapping of this complex and ever changing world and, simultaneously, be the guiding instrument to know how to navigate in life (cf. Delors, 1996: 77). In this context, we built individual or collective education plans to the war veterans, which allowed a greater autonomy and capacity of social adaptation.

UNESCO considers, with respect to structural components of education, four pillars of education as a science, which are: learning to know, learning to do, learn to live and learn to be (cf. Antunes, 2008: 51). These four assumptions of the educational process demonstrate, in our opinion, the broad action of education and its important role in the everyday life of any human being that lives and adapts to each day. In the project implemented, and through the different methodologies that we will refer later, we can enhance capacity in these four aspects of an educational process that occurs constantly in the individual.

The concept of education undergone several changes, and is now considered an holistic approach, whereby the human being is built in their daily relationships and inter-individual learning at various levels of itself.

Likewise, the concept of health has undergone changes over the past decades, based on the urgency of the international conferences on primary health care and later international conferences on health promotion. To that extent, health, beyond the absence of disease, is understood, firstly, in a broader way. It is defined as complete physical, mental and social well-being (cf. Antunes, 2008: 53) and this perception of holistic health can be extended to encompass all dimensions of the human being, including the spiritual dimension.

So, in this sense, we understand health as a personal task, and people feel free to decide autonomously (cf. Carvalho et al, 2008: 247). It seeks to empower the individual, through his training to a higher conscious and informed choice, about their everyday problems and health status.

Thus, health education must go through the understanding of human being, with all its components, learning to deal consciously with your body and mind. The changes in behaviour and prevention have been pointed as key areas of intervention of health education. It is the health educator the person which this intervention applies and who looks at changing the behaviour patterns and therefore self-organizing these individuals.

The meaning of development has also evolved from strict economic growth to a state of wholeness, with a view to self-realization of man like a citizen (cf. Antunes, 2008: 65). In this point, education appears to be crucial for the occurrence of the development. Therefore, we try to reinforce the idea of education development, potential considering the notion of development depending on how is understood in practice (cf. Pacheco, 2005: 44).

In this first approach, we analysed the changing concepts of education and health for more holistic conceptualizations, as well as the development concept, which comes to understand the interdependence of these three great pillars of human construction in the field of health education.
Examples of response mechanisms promoting adult education, focused and attentive, such as APVG, help their members with pathologies associated with war scenario and, therefore, it is possible to develop an appropriate response.

The predominant role of adult education in the communities and their place in the education system it is, nowadays, well recognized. Adult education and its focus on literacy should be all included in social, cultural or economic programs. Adult education is now understood as a framework for action at various levels to many diverse audiences, constantly improving their healthy development.

We worked mainly with methods from research and evaluation of activities of adult education considering the use of open methods of expression and freedom, with aim on behaviour's correction.

In order to apply the proposals for adult's education comes Nairobi recommendation. On Nairobi's are given different objectives and strategies for adult education. So, are glimpsed distinct contributions of adult education and their governing principles (cf. UNESCO, 1976: 4). The importance of adult education for the development of an individual and thus contributing greatly to the health of citizens, is in this recommendation identified as the duty of all UNESCO member states at this conference. For this reason, we highlight how important is the relationship between adult education and work, being essential the meeting of needs and aspirations of the adult in all its diversity (cf. Dewey, 2009: 204). We must consider the recovery of the experiences and strengthening of knowledge. Therefore, assign a meaning to the labour market involving the veteran after the arrival of war is of utmost importance. The individual can understand the relevance of their daily practice, acquire more knowledge about materials and tools and will be possible to make plausible associations with the everyday world that is inhibitory to many. A great contribution in these matters is adult literacy.

In our daily practice with war veterans, we always try to understand the individual as having an history of personal life, which often inhibits development; however, the individual is always in a society and registered in a particular community. As educators we must seek camouflaging as much as possible, without ever imposing our principles and beliefs in our practice, but trying to transform towards the acquisition of more knowledge and skills for a living integrated in society.

The colonial war veterans are beings within a society, but they left to take part in the day they gone to state of war. It was our duties to implement this project considering all the potential of human being through the mechanisms of integrative education. As in Paulo Freire ideas, the solution would lay on men to be integrated, incorporated into the healthy society from where one day left, resigning as turncoats, to a happy life. (cf. Freire, 1975: 85).

However, we understand that to become integrated, the individual should seek resemble each day, with the community known as more healthy. For these agents, we continue to understand the education and the health education, with liberating the role and potential for
development. We realize that education is called on appease them (cf. Freire, 1975: 90). Essentially we believe it is urgent to apply education as means for full development, then we propose that the adult education and community intervention are considered life forms whose meanings enrol playing certain games, particularly with syntactic and semantic rules, yet being semantically connoted by all of us who decided to play in this game (cf. Oliveira, 2005: 15).

We are always looking over the enforcement of this project, with acts of self-creation of the individual as acts of education, and vice versa, considering that the educational process is always a process of themselves. Thereby encouraging individual expression of war veterans through different techniques that went through the language, sung or played, crafts creation, or simply experiences like the verbal description, which in many cases it is for the first time about some situations of his past life. Working through life stories of users was essential for any one of these expressive practices.

We understand that human beings are to be a complex and versatile, remaining in a permanent construction. So it is understandable that the educational activity must meet the changing patterns through autobiographical methods, which enable the individual to its reconstruction after the absorption of new information. Every human has an enormous capacity for self-invention, and this capacity is connected to a process of lifelong education. However, all that was said with regard to self-creation, involves the use of a model of empowerment, empowerment to the people involved for their active capacities (more empowerment).

We try to demystify the practice of education and training for greater freedom and cultural openness in this population, considering the individual as a holistic being. We emphasize for example the “to learn to be”, using practices for the empowerment model and in this sense, means that education should contribute to the development of the whole person - mind and body, intelligence, sensitivity, aesthetic sense, personal responsibility, spirituality. Every human being should be prepared, especially through education they receive, to develop independent critical thinking and to formulate their own judgements, so he can decide for himself how to act in various circumstances of life (cf. Delors, 1996: 86).

At the same time, we also found that the higher the self-creation greater the solidarity, because there is an increase in the field of tolerance for diversity of cultures. Thus, education should promote the development of crops, for which policies are needed to promote educational, social policies on matters of peace, freedom and welfare. In this sense, is clearly referenced the role of education (self-creation) for the opening of multiculturalism and the specifics required by our society.

The lifelong education should be practised by and for all its participants. Hereupon we promote the sharing of knowledge, dialogue about experiences where individuals, because they belong to the same community (of war veterans), are better understood and this will reflect a community attitude.
Looking briefly to the different actors of the educational intervention and community, we realized that these are the elements that seek to enhance the organization and community development around it. It is of extreme importance the coordination between these different components.

Empowerment should lead to a permanent awareness of social environment on their own problems and capacity solution (cf. Guerra, 2002: 102). Needless to say, and how it is approached across this theorization, this awareness involves the full participation of all. Also in this regard, Vilaça Teresa shares the idea that we can understand this type of training models, such as strategies for change, which refer to the need of expanding the action and participation by all individuals in society and not only by the holders of power, who are socially and culturally closer to knowledge (cf. Vilaça, 2007: 90). Therefore, before execution of the educational program developed by us, we need to evaluate our target population, understand their greatest needs and identify the gaps that appeared to be more pronounced as limitations to their everyday experiences (mostly psychiatric illnesses). The important thing was trying to enable people to develop their own strategies for solving problems (cf. Vilaça, 2007: 91).

Our intervention much more than preventive was on rehabilitation for life, seeking to eliminate risk factors and increasing health, improving family life, relationships with friends and even professionals. The meaning of disability in society in constant update was one of the most debilitating factors most visible in these individuals.

The key is that everything that was mentioned earlier is particular and is context dependent. The process of development intervention must begin, therefore, in the community itself.

The educational project for this community came about, in our view, a democratic act as a facilitator of expression and thus after many years of misunderstanding. It seeks to promote the real integration of all men, regardless of gender, race, beliefs or experiences. For this reason is that John Dewey believes that our entire society, politics and community must uphold education as a social function, providing a direction and an opportunity to develop the immature through their participation in the group they belong. This is actually defending an education that will vary depending on the quality of life that prevails in a particular group (cf. Dewey, 2001: 27).

The development of community projects is achieved through adult education, which promotes full inclusion and active, participatory, creative and responsible of adults and their social environment.

The health education in a community is understood as a form of social education made by and for the community. So we give emphasis to the social and cultural activities as an important instrument in the community of war veterans. Social and cultural activities are understood as the vectors for the humanization of our technological societies. The entertainment activities are seen as ways of challenge the routine, stereotypes and prevailing conformism in order to achieve a higher quality of life (cf. Santos, 2007: 57).
In this sense, and through social and cultural activities, is our intention to trigger a new start on kinds of creation and self-creation on individuals, through facilitating their self-knowledge and the redefinition of life trajectories.

To consider an intervention salutary it is relevant to take into account the importance of three basic methods for education in war veterans, which are: the integrated, coordinated and global intervention giving specific factors (factors of disease and socio-economic conditions of the population); the systematic and planned intervention (properly contextualized and directed); the intervention based on community participation (considering the aspirations and desires of individuals).

3. Community action and the health education for war veterans program

The purpose of a health education program based on community action of this nature is the empowerment of communities and individuals to change, somehow, the way the individuals are living. We point out four strategic ways for participation and implementation of health promotion, which we consider plausible for reflecting the more specific needs of the war veterans population: the integral approach, which undergoes by several methodological ways; the use of different strategies for easing the approach to comprehensive plans, working different prospects of the individual composition considering the individual in society; the community involvement in health promotion and access to education, training and information.

The phases through which it passed the community action in this project for health developed in this educational project with war veterans, are essential steps for a community project:

1. Study and participatory diagnosis: Understanding the needs of veterans (educational, socio-economic, health);
2. Proposal for action: Individual and / or group;
3. Organization and participatory action: Application of educational activities / training for building capacity of individuals;
4. Evaluation and review: In order to understand the necessary corrections to be made in future interventions (made by the participants themselves);
5. Completion: The moment a person feels empowered to act and continue to pursue independently, knowledge and contingencies of action and updating personally and socially.

For these phases of the educational project, we focused, since its inception, in the concrete public which were war veterans.
It should be noted the appreciation of the ongoing evaluation of the actions promoted, and that is through assessment that we can come to the realization of how future actions may be conducted (cf. Estrela et al, 2003: 121). In this sense it was, and indeed even in a non-formal way, we finished each session, rather it was an individual or a group session, questioning the war veterans about their perception of the session elapsed. As we noted, speaking about the evaluation of an educational project implies the need to involve individuals, the protagonists of this process require that these programs provided them with instruments of self-analysis of action and would lead to a practical effort to reflect throughout the process (cf. Estrela et al, 2003:121). For this reason, we rely on these theoretical assumptions to support our practice since evaluation it’s a moment of dialogue between different actors and confrontation between different points of view (cf. Estrela et al, 2003: 121).

About the action, Paulo Freire believes that it is this genuine liberation, which is in the humanization process, is not something that rests on individuals. Not a word more, hollow, it is praxis that involves action and reflection about the world of men to turn it (cf. Freire, 1975: 95).

The participation, however, is made by all stakeholders in the project, whether professional or recipient taxpayer in the process. Is important, therefore, involve the protagonists. It can be seen like the participation, the meeting of efforts of all who care about solving these problems in order to outline common goals (in different areas of life) (cf. Guerra, 2002: 101).

The holistic concept of health is also viewed here as total well-being at different levels of being human. The process of empowerment is understood by us, therefore, as allowing the individual the ability to know yourself acting the right way. Health, in the present context can be understood through the Community action in education, and health education comes to the war veterans to enable greater well-being and a better quality of life through knowledge.

Throughout our intervention we seek to always address the four determinants of health in the community. These determinants, in our opinion, are fundamental to a free and informed participation. To this was implicated specific training and appropriate to the circumstances of daily life. These determinants are: human biology, the environment, the lifestyle, and health care.

Before turning our attention specifically on the practical methods implemented in this project, we still consider pertinent to mention the importance of the educator's role in implementing the process of mediation and intervention. We consider essential communicate, inform, empower, to interpret the needs and knowledge of the population, it’s basic functions of this professional. Informing about the programs / measures in place and promote information and education is the educator's role.

The desire for change or the need felt by the instability that the individual experiences in their day-to-day, must be in the population, so you can have any development. The educator's role is of a mediator of cultural, social, training of health through the implementation of such projects. He or she is the interface between the community and the agencies of social power, enabling the subsequent direct interaction.
It must be the promoter of multiculturalism, openness, solidarity and exchange. Thus, educators are seen as innovative and dynamic, the educator is deviant in relation to the dominant cultural pattern (cf. Santos, 2007: 57), sees the further inscribed on each person and whether supporting actor in the adult education process.

4. Intervention project of health education for war veterans

Life stories

Through the practice of the methodology of life stories we saw the deeper nature of individuals. On receipt of a war veteran, he always feels great reluctance to talk about their personal experiences, whether military or civil. However, from the moment they agree with the methodology, by mutual agreement, begin to scroll through the different steps of life story, so it begins a process of self-evolving. We allow processes memory and cathartic confession. Only the end of these steps, which could take weeks or months, is when the protagonist of the story reached the final conclusion about their experiences, personal awareness, aspirations and limitations that prevent you from fulfilling its development. At this stage of the process was clearly the way forward, which should be the next step, the demystification of the whole course of a complex life that had been exceeded.

The life stories in our project, had a double meaning because through them we were making detailed diagnosis of each individual and at the same time, it was implemented intervention / action, which involved the full participation of the individual to his own understanding.

After this we proceeded to the forward implication and definition of the best plan considering the needs of the individual concerned.

Thus we could follow the leading interventions.

Vocational guidance

If the individual was unemployed we try to understand what is his true calling. We tried to realize the aspirations of the individual through vocational guidance tests. After this phase the person could be referred to programs with aim on encouraging employment or training appropriated to their aspirations. Likewise, at this stage, there were individuals who retired because of their disability or diseases. These men failed to fulfil their dreams of life. Looking for the best way possible the inclusion of these individuals on a voluntary basis, in institutions regarding the integrate area of interest or the user to the system of teaching formal adult education considering access according his aspirations.
**Professional insertion**

The professional integration after life story, and often after the analysis made in vocational guidance, was a task that, often, passed by the increase in qualifications combining vocational training education in the area of interest to the user. In the same vein, the user started to have all the access mechanisms provided by the institution to be able to seek employment. Through non-formal and personalized training, which is discussed below, was possible to the individual the acquisition of knowledge about appropriate vocabulary to use in a job interview. Training was done at the level of basic computer science, the accomplishment of his curriculum vitae, the acquirement of a cover letter and response to job advertisements. Similarly and in parallel, and in groups, literacy sessions were held which enabled to the individuals the adoption of more comprehensive oral and written skills.

**Training directed**

The formation was, as we mentioned, one of the main ways to empower individuals. The war veteran with serious gaps in speech, writing and knowledge about their health and orientation in society, is someone who presents initially embarrassed by their condition. Thus, the individual training, after the life story stage, was often the method chosen to start working skills in war veterans. This training was going to through computer literacy, reading, analysis and completion of forms like requirements that are common in the everyday life. Much of the targeted training, only when individuals were predisposed, was carried out in groups. Often we used techniques such as education and training: role-playing, brainstorming, study circles, group dynamics, and other forms. Essentially we always tried to analyse current issues and give more importance to the issues and characteristics of the environment, the functioning of the national health system and its specifications etc.. In addition, hear what the users wanted to study, by analysing the specifics of some diseases, their transmission, prevention and the importance and effectiveness of treatments. For these issues we always tried to discuss the human biology that always been a cross-cutting theme of focus, analysis and understanding.

**Musical education**

The musical training came in this project because we checked in the diagnostic phase that a considerable part of veterans feel good about the listening to music or even the composition of it. Therefore, we obtained several reports about the high interest in music. The musical training began like an initiative to be implemented once a week because it had a great number of stakeholders and participants. The learning and the sharing in group work with some musical instruments, the similarity of this work with the social and cultural activities, the construction of the instruments themselves and the realization of performances in festivals by war veterans, was one of the most productive branches. The music gives the undoubted contribution to health and well-being of users which means that they could share space and time,
which for many would be impossible in other contexts. The different parties with different instruments and voices, began to sync and for us it became a whole share in harmony. This stage was one of the most interesting experiences of this project on war veterans.

**Social animation**

The social animation work was implemented considering the characteristics of most personal and most interesting contributions of each individual to the community. The practical implementation of some aspirations as well as knowledge of new practices emerged in the lives of war veterans as the existence of new life challenges and implementation of small tasks posed to overcome many of the steps hitherto insurmountable. Visiting museums and libraries, were also some of the activities. The performance of various crafts, construction of instruments for later use, carrying out the proposed activities of painting, sculpture and crafts were some of the actual achievements. In entertainment activities always seek, as well as in training activities, the deeper knowledge of the human body, the understanding of healthy lifestyles, physical benefits or harm and its consequences.

**Conclusion**

To conclude, we understand that the statement that follows, depicts clearly the importance of empowering populations such as the war veterans in regard to practices of health education. Thus, health education is known to be any intentional activity that involves learning related to health and disease, producing changes in knowledge, understanding and ways of thinking. It may influence or clarify values, can provide changes in belief and attitudes, and may facilitate the acquisition of skills, can still lead to changes in behaviours and styles of life (cf. Tones & Tilford, 1994 in Carvalho et al, 2008: 249).

**Bibliography**


Interlaced lives: analysis of three generations - The case of Family Cachopo

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Abstract

In this paper we introduced three generations of a family from Cachopo (Tavira) an Algarve’s small village. Through life stories of these three generations, we analyse social, cultural and psychological dimension, among others. Ours goals are connected with factors that influence the social change in families as well as the main role of family in nowadays. We live in society in transition where we can find some changes in family structures. So, this analyse aims to contribute with some important elements to get some conclusions about this family.

Keywords: family, transitions, life-cycle, biography, generation and social change
Introduction

Over the last few decades we can observe, in Portugal, deep changes in family structures, due to increased life expectancy and coexistence of multiple generations. These social, economic and demographic changes, highlights the participation of women in society, the reducing number of marriages, the increasing number of divorce and the decline of birth rate, among others.

This article is intended to be a contribution to a deeper understanding of one of the most complex domains of social life – the family. It aims to present an analysis of an intergenerational family from Algarve, especially the family Cachopo. We intend, here, thus to get a detailed understanding on the changes and/or family transitions that have occurred in three generations and the role played by the first generation in family relationships as well as in other generations.

1. Theoretical framework

Concerning the demographic situation in Portugal, the concept of family in society is very relevant. Over the past decades, it’s possible to observe some changes in society, specifically concerning the notion of family. Sampaio and Gameiro (1985), defines family as a “system, a group of elements connected between set of relationship in a continuous contact with the outside, keeping your balance over a development process driven by diverse stages of evolution” (cit in Alarcão, 2002, pp.11-12).

On the same line, Giddens (2004, p. 175) defined family as “a group of people united by kinship directly, in which adults take responsibility for the care of children”. Concerning the concept of family, Georges Murdock (1949) defines it as a

“(…) social group characterized by common residence, economic cooperation and reproduction. It includes adults of both sexes, two of which at least maintain a socially approved sexual relationship and one or more children from adults who cohabit with sexual relationship, whether of their own or adopted” (as quoted in Amaro, 2006, p.13).

For others authors, the concept of family “is not very specific”, being a social construction, which depends on the cultural values of each society or country (Saraceno, 1997, p. 17).

Research has focused only on the households, leaving aside the relationships amongst the elements of such a set. The family includes, therefore, a set of persons (which are in nature distinct), however, united by mutual relationships, in a process of continuous interaction and whose essence remains at the present time and extends into the future.
So, the concept of family features a group of persons related among others, by birth, marriage, social and emotional ties. In this paper, the “intergenerational family” refers to families where there are living representatives of at least four generations, although the literature finds that may have three generations. This system includes, in turn, a multiplicity of nuclear families and corresponds to the term “extended family” (Vicente, 2010, p. 6).

The concept of family is rooted in the concept of marriage, which according to Giddens (2004) is seen as the “union between two adults, socially recognized and approved. (…) marriage also unites a larger number of people who become parents. Parents, siblings and others blood relatives become relatives of the other spouse through marriage” (p.175).

Formally, the family was formed when two people got married, and it was a monogamous marriage (marriage between two people). Nowadays there are many couples who choose to live their lives together without getting married. So today, we should consider these couples also as a family, and thus talk about “families” and not family, since the nuclear family model is outdated because of our changing society.

The family consists of a “basic unit”, since it is a privileged place of generational exchanges. It’s where generations meet, help and complete themselves intensively. The presence of different generations ensures the transmission of cultural models, however, against a scenario where the average life expectancy has increased, family relationships present new challenges/changes. In fact, social changes have strong implications for the structure of family relationships, such as increased incidence of divorce and the number of people who choose to remarry (Vicente, 2010, p. 8). It can also be seen that families build assets and affects relationships. It’s therefore undeniable the role played by family networks as a source of support at different levels (Martins, 2005).

The concept of “family life circle” is a key concept in this study. Developed by the sociologist Glen Elder and the historian Tamara Hareven, the concept of family life course is much more operative, because it combines the family and social transformations at the important stages of life (including the entry of women into the labor market, marriage, retirement…). While the family life cycles refers to transformations of a nuclear family, the life course examines the interrelationships between individual trajectories, family life changes on a scale of a lifetime and social changes in their cross – impacts (migration, unemployment, war, …).

The family cycle is drawn from three criteria:

1. number of positions within the domestic group (father-mother-small child, number of children,…);
2. division of their ages;
3. changes in roles such as the role of the father chief of the domestic group, from the moment it ceases from being professionally active until his retirement (Segalen, 1999, p. 216).
Sacareno (1997) defined "life cycle" as a term that characterizes the history of an each family, evolution, transitions and critical moments of family life cycle over time. Also on the chronological time period of the family (or individual), for example, the birth of a child, marriage, loss of family member, among others.

Currently, we are witnessing in Portugal, to a progressive, postponement of family transitions, including entry into a marital or parenting, the leaving of parent’s house, among others. In fact, the question of transitions is the “engine” of numerous studies, theories and controversies (Guerreiro & Abrantes, 2007).

While integrating/embracing a multitude of dimensions, the question of transition “(...)”, until today has not been explicitly addressed by any theoretical framework, it can be said that this is a subject of research in the process of constitution” (Almeida, 2008, p.3).

In the last decades, there have been profound changes in family patterns, with free choice of spouse, the appreciation of affective relationships and consequently of marital relationships. In this context “an intergenerational regard” about family transitions is an extremely important approach to analyse life trajectories – the entry into working life, leaving the parent’s house, the formation of couple, the birth of children – meanings, values and family practices. While ties between generations, the investigation about memories open new ways to family continuities and in this context, we turn to biographical analysis through accounts of life, that allows us to capture the different behaviour of the elements by age groups and identify and understand their family trajectories (Segalen,1999).

2. Context and methodology

First, it’s important to note that the origin of the family in question is Cachopo, a small village, in the municipality of Tavira (south of Portugal). In this sense, it becomes relevant to draw a short description of this village, since it gives us relevant information’s to this analysis itself.

Located in the Serra do Caldeirão, the parish of Cachopo belongs to the municipality of Tavira, and has an area of 197.30 s.m, yet in terms of population represents only 4.1% of the population of the country.

Cachopo presents some demographic problems, having an aging population and a very small number of young people. In fact, in this parish there is an intense process of desertification due to the exodus of the younger population, trying to find elsewhere alternatives to agriculture and welfare.

Even though it’s not an attractive parish to young people, it has unique capabilities, including the natural environment, landscape and local products, such as – handicrafts, dry fruits, agro-food products. With regard to economic activity, agroforestry is the main activity, particularly associated with the extraction of the cork. The gastronomy and handicrafts (weaving,
iron-fitting, basketry) are alternative activities an parallel with significant growth in recent years (INE).

Taking into account these theoretical perspectives and the object of study that deals with the intergenerational family analysis, it’s important to understand the role played by families in the development of individuals, as well as identify differences and similarities in the three generations, in the changes of the following dimensions: school trajectories, social practices, social networks (cultural and economic) – income and expenses. To achieve this goal, we collected biographical information about three generations of the family.

Given the nature of this study, essentially qualitative, we focused on the biographical method (life stories). In fact, and accordingly with our aim, the approaches of biographical and life stories has imposed itself as a methodology research, since it consists of an intensive collection of data with biographic character about one or more persons, by conducting several interviews (Couceiro,1997).

In this sense, Life-Story is the story that one chooses or what (co) builds on her/his life as honestly as possible. The person tells what (s)he remembers and what intends others to know about it. It is therefore a narrative with the fundamental elements of a person’s life (Atkinson, 2002). When it comes to in-depth interviews and especially of “life stories”, they place technical and ethical issues, due to the intimate atmosphere of biographical narrative. In fact, in reality, ask someone to tell us their life is extremely complex (Guerra, 2006). Life stories allow you to get a picture of life and the profile of people over time (Pérez Serrano, 1994).

This biographical method is presented in turn as the most suitable for the realization of this study, as it has the raw material of the past three generations in terms of changes in the past, present and future. It’s important to note that the story of a person’s life is never straight and is highly related to family background, social, cultural and professional that surrounds it.

For the research here reported, we conducted four interviews to members of the family *Cachopo*. Relatively to the characterization of the interviewed, there were interviewed three females (Maria, Francisca and Gabriela) and one male (Joaquim), aged from 28 till 76 years old.
The figure 1 represents the relationship between interviewed.

Fig.1

In this paper, we focus on the following questions:

1. What kinds of changes occurred in the family “Cachopo” over the three generations?
2. What factors influence social changes in families?
3. How do you feel the family changes in women roles?
4. What is the main role of the family today?

“Cachopo” Family – 1st, 2nd and 3rd Generation

Based on “life stories”, our analysis focus on the evolution of family structure in terms of life quality, social mobility and vital cycle, related to Cachopo Family, a socially model family from Algarve.

In fact, the analysis of this family life cycle aims to focus on a historical perspective, in order to outline the events in the past and thereby helped to give meaning to life events in this family nowadays.

Early on, we were asking to the interviewed about their child road, so “Joaquim” said:

I was born in Seixo-Cachopo, I used to stay at my aunt’s house, and then I went to school, I used to walk 2kms to go there and then to get back (...)my parents worked in agriculture, in the fields.
In terms of schooling, in the first generation couple, the male - made year 3 and only later finished year 4 (usually primary school) and the woman also made until year 4 which corresponded to the minimum school leaving age at the time. We can also note that the elements of the first generation began working in the land very early (M-10 and W- 12), in agriculture, what was quite common at the time. The land was considered the support of all families in the village, mainly because the incomes were very low, although in a very small measure, the land gave them, the basics of the livelihood.

*When I left school, I started working in agriculture, I was 10 years (Joaquim).*

*With 10 years, I was already moving and picking up olives, up to 20/22 years. And at 22, I saw that I couldn’t make money, so I decided to study and later came to Faro, already in 1973 (Maria).*

Although agriculture provided small incomes, was a very important source of supply for families at that time. Indeed most of these families had a small garden or a bigger land were they cultivated agricultural products – the family in question, had a small garden in the front of their house.

*Because we worked the land, there was always food in our house. We only used to buy sugar and coffee, the rest was provided by the land (Maria).*

Later, when the man was 17 or 18 years, his father told him to learn the trade of shoemaker. He began working in people’s homes as a cobbler as, this profession provided a better quality of life compared with other existing occupations in the locality, since he was earning twenty cents, while others earned only seven cents –

*It was very good at the time...I was sitting at home and earning more (Joaquim).*

The union occurred when the woman was 17 and the man 25 years. Usually women married very early, because the only purpose of theirs lives was constituting a family: being a good wife, good mother and good housewife. At the time women married, on average, around 15 or 16 years old. In this particular case, the woman married later, very unusual at the time.

*After living together, I married in 1959. I met my wife in a party-dance...our parents didn’t care (...) one day I brought her home and told her “stay with me”. My parents didn’t mind, so I spoke with my old grandmother first. I said “Grandma, this is Gertrudes from now on where she stays I’ll stay, where she goes, I’ll go...” (Joaquim).*
Once the couple is the main subsystem of the family, it’s important to emphasize that the family system is a complex conjugation of relationships that, in turn, are extremely important for the development of individuals. As for relationships with the family, the respondent reports that the relationship with the parents was good, highlighting the degree of closeness between family members and the existence of respect for older family members.

At the time people were very conservative (…) marriage was for life and I lived a few years without being married, but then my wife pregnant and my parents said: “you have to marry” (…) the whole family agreed and we got married (Joaquim).

This testimony contributes to the understanding of family relationships and, consequently, to the knowledge of family analysis.

The fact that they had only one daughter reveals an interesting fact because as we know, it was quite common at the time, couples had several children, mainly because there was no family planning or contraception. The evidence found in this family, was just a matter of change, or, as they say,

God didn’t want us to have more children (Joaquim).

Like her parents, “Francisca” married and together with her husband, decided to have only one child in order to provide that child a better quality of life instead of have more children.

Joaquim’s wife always worked at home and was responsible for the education of their daughter, while he had the financial responsibility – he had to support the family. However, sometimes the woman helped her husband in the fields. But, the interviewer mentions that his wife wasn’t used to that kind of work and was very hard for her.

As for the education of the daughter, “Joaquim” refers that his daughter has completed year 12 (last year of secondary school), never missed a year and always had school materials. Highlights the fact that his daughter had to go in a bus every morning to a school in Faro (one hour and half trip) and only came home at the end of the day. He also says that his daughter applied to public university but wasn’t accepted and in the following year went to a private university in Lisbon but that what she really wanted was to work. She started at the municipal services in Faro and went through several sectors until she became Head of Section. A few years later the daughter took her degree and she was promoted; now she is a 2nd class Senior Technical.
Francisca confirms what was said earlier by her father and says had a regular education. Completed the elementary school in Cachopo, they had the tele-school\(^1\). Then she went to high school in Faro, went back and forth every day and after finishing secondary school, applied to the University.

\textit{(...) in the first year I didn’t went. In the second year, I went in Philosophy in Lisbon...Ah...I was very foolish by that age, I wanted to work, be independent, so I didn’t went there} (Francisca).

There is, in this family, the emancipation of the daughter who decided to work, be independent and live in the city – Faro (the capital of the region). In this sense, the desire to work won. Francisca wanted to be independent and began working in the Municipality of Faro, where she held various sectors. Starting to live in Faro, due to employment opportunities and quality of life. According to Gimeno (2003), the emancipation of children from theirs parents’ home is one of the less studied family transitions. In fact, the daughter wanted economic and physical independence.

Some years later, “Francisca” returned to school because she felt needs at work and also because her son was already a “bit” more independent. Took a degree in Sociology, became very complicate, to work, study and raise a family simultaneously.

\textit{It was a little tricky to study because I had to reconcile work with school} (...).

After graduation, was reclassified to Superior Technician which resulted in the growth of a substantial number of tasks in professional terms.

As is known, is the family that develops in the person a system of values, attitudes, beliefs, various aspects of life, school, work, friendship, among others. According to “Joaquim”,

\begin{quote}
I always said, to her, to study, but after her son was born and things were more complicated.
\end{quote}

Concerning to “Joaquim” and his wife, the monetary resources available came only from his job as a shoemaker and later as president of the Parish of Cachopo. As the earnings were low, the costs were also proportional. They didn’t spend money on food, the land give them almost all and they used to raise animals, such as chickens, pigs, sheeps, rabbits.

\(^1\) While sub-system of education, Tele-School was characterized by distance learning and “began in 1964 as a solution to extend the 5 and 6 years of schooling to a greater number of students” (Caldas & Silva, 2001, p. 383).
Regarding to money management, “Joaquim” mentions that

Some years ago, everything was much cheaper than it is today. You know that the euro has duplicated everything (...) the bread was cheap, now has risen a lot. But the big change came with the Euro, coffee was 50 escudos and now is 0,50 €. Everything increased.

Regarding to family relationships, all respondents reported, that they have a good relationship with the family. Relations between generations have always played an important role in the construction of personal identify as well as in the foundation of social ties. Thus, we must not forget that these relationships are a key element of social integration. The relationship between siblings may also be different depending on the number, the age difference and ever sex. In this sense, “Maria” highlights the relationship with her sister, saying she doesn’t was many memories of her sister because was older (six years).

As she walked to school, I was with our parents in the river, I don’t have many memories (Maria).

My mother and my aunt were always together, even though my aunt was older (Gabriela).

Also as part of family relationships, the interviewee “Gabriela” said that

Talking about my uncles, they’re spectacular, every time I go there, I always have some sausage and cheese (laughs), there’s always food and drink in the house, I remember when my uncle (...) was always busy taking care of the pigs.

Regarding the relationship with her cousin/godmother

It’s a relationship with respect to one another, she always gave me good advice, even helped me when I made my internship, the one we make in the final year of the degree (...) (Gabriela).

“Francisca” highlights the support she gives her son on school matters. The parenting process is, likewise, extremely important, because the adult generations contribute to the personal development of younger generations. She also, adds that who usually helps in school work’s it’s always her. About her son’s school choices

So far we haven’t talked about it but next year he’ll have to decide.
Talking about his cousin education, “Gabriela” says:

I rarely saw him study, my godmother used to forced him to study and do the homework’s, but none of that was well done, the games were always first, even when I went there with my mother, he barely left the computer to give us a kiss, we had to go to his room because he was “glued” to the computer.

“Francisca” emphasizes that:

Although I tried he never liked reading, he reads because it’s required in school...he’s English is good but he’s speaks better than he write’s and also in relation to writing he has some problems because he’s dyslexic.

With regards to changes in the family, nowadays couples get married later, delay the age of motherhood, and have less children, among others. In this family, it’s possible to see these changes and also changes in lifestyle or way of life.

Today my grandson has a very different life compared with his mother’s life. His mother always worked, always studied...my grandson just talks with the computer and the prediction aren’t good. We shouldn’t entirely forget the past, but must try to forget the lifestyles of the past (Joaquim).

The differences are several, we had so many difficulties back then. In our time was no television, no nothing. Now they have everything(...) at school, every mistake, a slap...we hadn’t calculators, we had to learn the multiplication tables with no help from machines (Maria).

Since my grandmother passed away, we don’t go so often to Cachopo, we had a ritual every weekend, we had lunch on Saturday at the home of my grandmother’s father and we used to go to Currais to see my other grandmother (my mother side), slept there and only returned to Faro on Sunday night, nowadays Cachopo is completely desert and we never returned to Currais, now we only go to Cachopo in the festive seasons such as Christmas or Easter (Gabriela).

It appears that today is very difficult to provide or receive family support, Joaquim’s daughter barely earns enough to pay expenses. So the family has to live with few money, adding that

(...) there’s no light at the end of the tunnel and the next months will be very complicated. Everything increased, for example transport (...) there’s no future.
Talking about social/cultural and leisure practices, the only means of “distraction” were the church on Sunday, markets and very rarely, the dances that were done in the village. Inside the family traditions, was included the “pig killings” as a cultural practice that persisted at the time. It was considered a social event, family, friends and neighbors joined in an atmosphere of festivity and celebration, in which all helped and participated.

*Today it’s all over. The youth was gone (...) the previsi on is full desertification* (Joaquim).

About the “killing the pig”, Maria says that before

*The pig was bought in the middle of October, feed to grow a year and then in December, the pig was killed in a great party. People and family helped in the killing and then a great lunch was served for all people. While women treated the meat, men roasted meat and salted ham...to eat over many months. Back then we didn’t eat meat everyday like now. We eat cereals, beans, cabbages and all those things that the land gave us* (Maria).

Also adds that the dances were very common and women learned to make lace and embroidery since childhood.

*In the community everyone learned from each other’s and usually was the grandmother who taught* (Maria).

We can also refer as common practice of Francisca, the gym, theater, concerts, and contemporary dance, among others. Thus, it’s major the difference between the practices of the first generation to the second one.

**Conclusion**

From an objective description of some events of the Cachopo family, it was possible to know the changes that influenced the family system through its evolution. In fact, the family experiences that this article presents are familiar reality. In this way, the interviewees remind important events or even not so important events in their lives.

There is in the second generation (Francisca) a social and geographical mobility from country side towards the city, in order to find better living conditions and opportunities that the country side couldn’t offer. Indeed, and related with this factor, we find the emancipation of
women. The role of women is no longer confined to be a mother, a wife and housewife and together with her husband, started to be the economic base of the family. The women started working outside the house, being paid for that.

Another aspect we can mention refers to the decline of the fertility rates – “intragenerational contraction”. In fact, modern families have a decreased number of individuals in each generation (Vicente, 2010).

With the regard to the third generation, although still depending on the second (not only in economic terms but as well in protection, for example), it’s where we could find the major cleavages with relation with the previous generations. Some say that this is the “generation junk”, perhaps because of the change of values, principles, wills, relationships that are established, among other things, when compared with the previous generation and much more with the first generation.

Finally, we can say that these are several differences between the three generations, regarding to social/cultural and leisure practices and more specifically between the 3rd and earlier generations. Through this family, we saw that the diversity of structures and models of family are very relevant and different in nowadays.

The democratization of society as well as awareness about human rights affected the structure and family roles. In this way, society and families should be more tolerant about familiar decisions to fight the crises or to adapt to the new challenges of society. With the advances of technologies, we can see that family still have an important role concerning to heritage and transmission of values.

In conclusion, we should give a vote of confidence for the future generations in order to contribute for a better world and, at the same time, keeping family values.

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Low skilled older (male) workers and lifelong learning – what are their *barriers and motivation*?

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**Abstract**

*Mature (male) industrial workers’ profile, views and values:*

- The kind of education they are motivated for should be: mimetic, minimalistic and instrumental (in its total set up resemble the workplace and the workers’ daily lives; not interfere too much with family and leisure time; have a clear output and result, i.e. for instance a (better) job (situation)
- They suffer from a lack of routine in literacy and numeracy, including ICT
- They have negative interpretations of ‘change’, ‘schooling’, ‘careers’ etc. – mostly due to a lack of self confidence, based on socio-cultural experiences as being ‘inferior’, ‘failures’, ‘losers’ etc. (in school – not in practical work!)
- In a Danish context you will also see dyslexia and various forms of functional illiteracy etc.
- They are typically trained (brought up, socialized) through generations to develop a ‘reactive’ attitude (‘the most important competence is to learn to *do what you are told*’)
- In contrast to this ‘post-industrialism’ requires a ‘pro-active’ attitude (‘everybody should develop will and capacity to *tell (oneself and others) what to do*’)

*How to deal with this in lifelong learning?*

- Establish workplace learning (or: workplaces as learning arenas and environments)
- Offer this target group personal and vocational development in a practical context and set up
- Activate the workers’ own experiences and voices
- Involve all relevant stakeholders in participatory processes (for instance via the method of ‘future work shops’ – bottom up processes, during which criticism, utopian horizons and reality elements are brought forward, reflected upon and elaborated in collective decision processes)
- Realise a balance between the complexity of the challenge and the resources needed

Most of the empirical background for this paper is rooted in a project that was carried out by Department of Psychology and Educational Studies at Roskilde University, Denmark: ‘Older workers in Focus’, which was a EU Social Fund Project carried out in cooperation with a number of trade unions and two companies in Denmark. A main idea was to see if leadership of managing demographic changes could be optimal successful by bringing forward the voice of senior workers themselves, by the means of participatory methods, i.e. interviews, questionnaires and future scenario workshops.

**Keywords:** lifelong learning, low skilled, older workers, barriers, motivation.

## 1. Background

The background for the project was that developments and changes in the labour market in general have for quite a number of years led to older workers being laid off and finding it difficult to return to the labour market. For the group of unskilled male and female workers on the labour market, i.e. people without vocational qualifications and with 7-8 years of schooling, technological advances and increased efficiency in the workplace have meant that the manual work-tasks of former times have to a great extent been replaced by the tending of machines and by technology. This trend has meant that many older workers have found it hard to keep abreast of developments. In addition, older unskilled workers in routine and often physically demanding jobs are at present one of the most exposed groups when jobs are on the line, since it often calls for an extra effort to motivate this group to volunteer for in-service training and job rotation. Bearing the ageing of the work-force in mind, there would seem to be an increasing need for retaining and employing more older workers in companies. So an active effort to introduce initiatives on the public and private labour market that can help to increase the occupational frequency among the group of unskilled male workers over 50 would seem at present to be relevant.

**Aim and target group**

The overall aim of the present project has been to carry out an analysis that can help develop methods and models for concrete and actively implemented policies for older workers,
ones that can improve the share of the employed among unskilled men over 50. In other words, the purpose has been to uncover the existing opportunities and barriers specific to companies when it comes to upgrading and retention on the labour market for this particular target group.

The project has its empirical point of departure in the companies Renoflex-Gruppen (refuse collection) and DSB S-tog (cleaning staff on the Danish state railways). Both companies employ a good deal of low-skilled older workers, and the management cooperate with the elected representatives and the trade unions about developing and maintaining a corporate social responsibility in the companies. They have both faced major structural changes during the latest 10 years related to privatisation and new forms of work organisation. The refuse collection company was formerly run by the municipality, but is now private. DSB S-tog used to be a state activity, but is now a more commercial oriented company, owned by the Danish state. As a result of these general changes the workers and their organisations constantly face a discourse of efficiency, productivity and competition. In this context the question of seniority and older workers policies was relevant to the two companies. They are both based in Copenhagen.

The target group for the project was unskilled men, although all employees in the departments of the two companies concerned were included. The project attempted then to include other workers than unskilled male workers over 50. This was because the drawing up of an active policy for older workers concerns all groups of employees – and because experiences from similar projects show that the inclusion of all workers provides maximum legitimacy and support.

The project was sponsored by EU Social Fund, Danish labour market authorities and carried through as part of a long term cooperation between Roskilde University (www.ruc.dk) and FIC (a Danish trade union international training centre – www.fic.dk).

2. Research methodology

The project was designed as the implementation of four phases: 1) the general research, 2) a questionnaire and interview survey, 3) a future scenario seminar, and 4) recommendations concerning ‘good policy for older workers’. This design with its elements (especially phases 2 and 3) of qualitative methods and a bottom-up approach was chosen because we wanted the voice of the older workers themselves to come forward. Many discourses, policies and recommendations have had other rationales, i.e. company efficiency, state expenditure cut downs etc.

3. The general research

Prior to drawing up and implementing the questionnaire survey among all workers in the departments involved in Renoflex-Gruppen and DSB S-tog, a general literature study was undertaken of the existing research and findings related to the issue of seniority and state and
company policies for older workers. This literature seems to focus on 1) the political aims for older workers, and 2) the strengths and weaknesses of older workers on the labour market. The main findings in the existing literature are:

1. Population trends as regards age composition indicate that many of those now actively employed will retire in the next few years. This retirement will take place earlier than even just 20 years ago and, as a consequence of the hegemonic understanding and presentation, it will lead to a future lack of qualified labour. If the Danish economy is to be prepared for a fall in the workforce, and in the longer term a greater burden resulting from a higher proportion of elderly people, it is absolutely vital – according to the government – for there to continue to be a solid surplus in public finances in future years, especially if political economic aims are to be realised at the same time. This surplus can, among other things, be ensured via increased participation in employment – also among older workers. Some barriers would seem, however, to exist on the labour market for older people who are out of work: there is a certain over-unemployment among the 55–59 year-olds – and older workers who are laid off have a greater risk of remaining out of work.

2. The analysis of the strengths and weakness of older workers on the labour market revealed that younger workers are assessed higher when it comes to the more dynamic factors and to knowledge of new technology. On the other hand, older workers are thought to possess advantages when it is a question of the ‘soft’ qualifications, less absence through illness, as well as the areas strictly relating to production. Older workers possess many of the qualities that companies feel are important – with the exception of the more dynamic factors such as initiative, the ability to learn new skills, the ability to adapt and knowledge of new technology.

4. The questionnaire and interview survey

Based on the above literature study, i.e. inspiration from previous surveys and the older workers’ own wishes and ideas as well as the Act on the Work Environment, a questionnaire was drawn up. The questionnaire was given to all 206 workers in the involved departments of Renoflex-Gruppen and DSB S-tog. 42% of them chose to fill in the questionnaire. The respondents were equally spread between the two companies. 5% of the respondents are less than 30 years old, 17% are 31-39, 22% are 40-44, 12% are 45-49, 29% are 50-54, 9% are 55-59, and 3% are more than 60. This means that 89% of the respondents are between 31 and 59 years old.

The design of the questionnaire was based on the literature study mentioned and findings from previous, related studies (Hansen et al, 1998). We asked for background information on age, gender, position and years with the company. Furthermore, the themes were
the workers’ own notions of a good workplace and work life, including work conditions, work environment and social life in the workplace. Finally, themes around seniority: the respondents’ view on specific qualifications – and lack of qualifications – among the older workers or senior colleagues in the company; their own plans for retirement – and their ideas about a proper company policy for older workers.

The aim was to try to gain a picture of the two companies and their employees and to uncover opportunities and barriers specific to the company regarding the upgrading and retention of unskilled men over 50. These opportunities and barriers were, as previously mentioned, to form the basis of the development of concrete methods and models for the implementation of an active policy for older workers. On the basis of the questionnaire survey, an interview guide was subsequently prepared and a number of interviews were carried out: 19 interviews with a total of 30 respondents - 14 interviews with representatives of management, shop stewards and participants from trade union organisations, and 5 group interviews with older workers – all from the two companies and thus respondents of the questionnaire.

The aim of these interviews was to focus on various specific issues that had emerged as a result of the questionnaire survey and to gather concrete proposals for the drawing up and implementation of a policy for older workers.

5. The future scenario seminar

After the interview and questionnaire survey a one-day future scenario seminar was held for future older worker colleagues (mentors who are to assist in implementing a policy for older workers), older workers, shop stewards, management representatives and trade union representatives, in total 20 participants. The aim of the seminar was to give all those involved the chance to discuss opportunities and barriers for upgrading and retention on the labour market among unskilled men over 50. This should enable all those involved to influence the basis of a policy for older workers as much as possible. The seminar had been organised as a typical future workshop with a (short) introductory phase consisting of two presentations: one about potentials and perspectives for an older workers policy, by a trade union representative – and one about barriers, by a management representative. The general principles of the future workshop was presented: for the criticism phase and the vision phase it goes that all spontaneous key words from the participants’ brain storm will be written on wall papers, constantly visible in the room. There is no space for discussion or long monologues. In the action phase a group work was done to discuss and produce realistic plans of action related to the themes from the vision phase. Finally, the results of the group work: the concrete plans of action, were presented in a plenary session (for future scenario seminar models, see Jungk and Müllert, 1991).
6. Findings

The sample sizes of our empirical work is quite small and the response proportion quite low so it does not really make sense to try to give correlations between the two companies, age groups and lengths of service etc. But bearing these limitations in mind some general findings of relevance came up.

The questionnaire and interview survey probably provides a plausible picture of male workers in the 31–59 bracket and with 3–20 years' seniority. For this group it goes that:

- A good work environment (80%), job security (80%) and influence on planning one's own work (74%) played an important role at the time when the workers applied for a job at DSB S-tog and Renoflex-Gruppen.

- A meaningful job involves in particular good colleagues/good solidarity at the workplace (91%), and a good physical work environment (84%).

- 72% of the employees feel that their present job ‘to a great extent’ or ‘to some extent’ satisfies their requirements for a meaningful job.

- 80-85% of the employees feel that older workers are a stable workforce, that they possess human maturity, and that they have sufficient qualifications. All those taking part in the interview survey are equally positive in their descriptions of older workers.

- 89% of the employees feel that ‘to a great extent’ or ‘to some extent’ there is a need of a policy for older workers. Most employees under 30 have answered ‘to some extent’ or ‘not at all’ to the question of to what extent their company is in need of such a policy.

- Management representatives would seem to be more cautious as regards a policy for older workers than the employees, shop stewards and trade union representatives.

- Most of the employees agree that pressure of time/stress (84%), uncertain future/no job security (67%), outsourcing of various areas (67%) and lack of information about the development/state of the company contribute to mental attrition, i.e. to lower the quality of the psychological and emotional aspects of work environment.

- Work environment is assessed as being important by all those interviewed. But depending on the position of the interviewees different approaches to work environment can nevertheless be detected. For example, quite a few management representatives speak in favour of the strategy ‘work smarter and harder’, while quite a few shop stewards and trade union representatives speak in favour of the strategy ‘work smarter not harder’.

- An active policy for older workers must take account of the immediate lack of motivation felt by older workers when it comes to in-service training. This can be overcome by, for example, offering other types of training, based on workers' own
articulated needs and wishes, and taking place in a familiar learning environment (see Hansen et al, 1998).

During the criticism phase of the future scenario seminar it became clear that the most significant barriers for a good working life in DSB S-tog and Renoflex-Gruppen were:

- Lack of trust among the various parties.
- Fear of being typecast (as an older worker).
- The fact that companies are competitive work places (they now have to compete on a full equal footing with other private companies).

During the vision phase the formulated criticism was answered by personal visions of a good working life as an older worker. The most important visions that an active policy for older workers ought to include/work for were:

- Influence on the organisation of work.
- Job security.
- Accordance between recruiting policy and policy for older workers.
- Respect for experience at the company.
- Cooperation between trade unions concerning agreements (common framework agreements between trade unions).

**Conclusion and recommendations**

Our survey has shown that it is possible to identify models and methods of making company policies for maintaining and integrating older workers by the means of bottom-up approaches. Also the study points out difficulties and barriers:

- although there is a tradition in Denmark for cooperation between the social partners in companies and society, there are differences between the view points of the workers and the management
- there is a lack of trust from the side of the workers, based on experiences of political discourses and company strategies of efficiency and rationalisation instead of social responsibility towards older workers
- also there seem to be a general feeling of insecurity among the workers as to what extend politicians and company management perform only verbal inclination towards strategies for older workers and not practical action
the general structural changes of companies related to privatisation, competition and technological development create an atmosphere of search for younger workers with higher skills, readiness for change and flexibility in job performance and changes in work organisation.

- It also seems as if there is a slight tendency towards younger colleagues being less occupied with the necessity of an older workers policy than among the older workers themselves.

In general these results are in accordance with what is already shown by other related studies; it takes a specific and focussed effort to create forms of work change, qualification building and flexibility that are in accordance with the needs and wishes of low skilled, mature, male workers. This implies that if the project (to keep mature workers active on the labour market in the light of ageing of the workforce) is going to be successful older workers policies in society and companies must be based on the voice of the senior workers themselves.

The above analysis as the point of departure, the following recommendations can be made concerning the development of a ‘good policy’ as regards older workers:

- Management representatives ought, before embarking on such a project, clarify and make plain what needs and intentions the company has regarding a policy for older workers.

- Optimum internal information ought to be ensured in the departments/companies involved. It must be clear who is responsible for what.

- There must be support from all players at all levels in the departments/companies involved – employees, shop stewards, middle management, management and trade union representatives, etc.

- All information meetings for employees ought to be held in the workplaces, since this means a much larger turn-out.

- It would seem to be a good idea to hold a future scenario seminar, since this gives the policy for older workers a democratic anchorage.

- When implementing possible educational programmes, attention ought to be paid to the fact that older workers, all things being equal, have a spontaneously low level of educational motivation and that time should be set aside for talking about this.

- In developing a policy for older workers one should remember that the aim of such a policy is both to recruit new older workers and to retain those already at the company. So the policy ought to ensure both a good work environment and good opportunities for in-service training and further education.
- The policy ought to be practical and usable, not just consist of a list of general declarations of intent.

- The policy ought to be able to take into account both the company’s and the older workers’ individual wishes and requirements. In other words, the policy ought to contain a number of choices that can be offered, according to the wishes and requirements that the company and the individual older workers might have in a concrete situation.

- When the employee is about 50 years old, real dialogues ought to be started as to what wishes, requirements and expectations the employee and the company have for the employee’s last 10-20 years on the labour market. The colleagues of the individual employee ought to be included in the dialogue.

- All parties should accept that it takes time to develop a policy for older workers. A thorough, comprehensive process is important for the quality of the final result.

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Lifecourse perspectives on learning trajectories and wellbeing: an overview of some initial findings

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Abstract
This project will present new quantitative evidence for contemporary ‘third age’ individuals on the relationship between their individual histories of learning and subsequent wellbeing. Policy has tended to focus upon those who do not participate in adult learning, or concentrated on the economic (earnings) benefits of learning in adulthood. While important these approaches do not present a holistic view of the lifecourse or attempt to model the consequences of accumulated learning experience for enriching later life.

This research adopts a long-term perspective both on participation in learning and the potential benefits of learning. The research objectives are, broadly, to construct typologies of participation in learning through the lifecourse into early old age, and then to relate these differing learning ‘trajectories’ to wellbeing.

The project uses quantitative data from the National Child Development Study (NCDS). This is a large sample of some 17,000 British individuals who were all born in a particular week in March 1958. The cohort was followed up through childhood and have been interviewed several times in adulthood, most recently when they were 50 in 2008. The dataset contains rich information on the background of cohort members, their schooling and qualifications, as well as their career, health and wellbeing in adulthood.

Using this data it will be possible to track the extent to which people undertake learning at different phases of their adult lifecourse from age 16 to age 50. This includes coverage of a
range of different types of learning in adulthood including obtaining qualifications, vocational
training and learning for pleasure. These individual pathways of learning will be aggregated into
a small number of distinct learning trajectories from consistent non-participation in adult learning
through to continuing engagement in many forms of learning.

Quantitative analysis will then seek to reveal the determinants underlying these trajectories. This
research will address the extent to which attitudes formed in early childhood, and at school,
affect participation in learning through the adult lifecourse. It will also be possible to consider
intergenerational influences on engagement in learning in adulthood e.g. how the level of parental
education may affects their offspring’s attitude to learning even after initial education has been
completed.

The specific research questions to be answered are:

(1) How do individuals move in and out of learning participation from the beginning
of adulthood through to early old age?

(2) To what extent are these learning trajectories determined by factors which occur
in childhood?

(3) Which factors explain why an individual is on one learning trajectory rather than
another one?

(4) What are the main determinants of wellbeing in early old age?

(5) After controlling for other determinants of wellbeing, do the learning trajectories
affect wellbeing in early old age?

The major innovative features of the proposal are, firstly, the analysis, for a large birth cohort, of
participation in learning over a substantial part of the adult lifecourse and, secondly, making
connections between long-term learning participation and the wellbeing of the individual in early
old age.

Keywords: lifecourse, lifelong learning, learning trajectories, wellbeing, successful ageing.

Introduction

Lifelong learning has economic and social benefits for individuals in society (Schuller et
al, 2004). This project presents new quantitative evidence for contemporary ‘third age’
individuals on the relationship between their individual histories of learning and subsequent
wellbeing.

While there is certainly existing research on adult learning much of it concentrates on
identifying the characteristics of a group of so-called ‘non-participants’ who then become a focus
for policy concern (UKCES, 2009). These cross-sectional analyses have a short-term perspective
which needs to be balanced by research on learning over longer periods of time. There are only a handful of such studies at present.

There is growing interest in the influence of learning on a range of non-economic outcomes, notably health and wellbeing (Schuller et al, 2004). While important and innovative, existing work on this topic also has some limitations. The research has been mainly on younger adults. It has concentrated on the immediate benefits of participating in courses or has investigated short-term change associated with participation in learning perhaps between two waves of a survey. As a consequence, the longer term outcomes of learning have been somewhat neglected. For example, engagement in learning early in the lifecourse may build resilience which helps counter the impact of adverse events later in life.

To address these gaps in our knowledge, this research will adopt a longer-term perspective both on participation in learning and the potential benefits of learning. The research objectives are to construct typologies of participation in learning through the lifecourse into early old age, and then to relate these differing learning ‘trajectories’ to wellbeing at age 50.

The following questions will be addressed:-

1. How do individuals move in and out of learning participation during adulthood?
2. To what extent are these learning trajectories determined by factors which occur in childhood?
3. What are the factors which explain why an individual is in one learning trajectory rather than another one?
4. What are the key childhood antecedents of wellbeing at 50?
5. How important is subsequent learning (in adulthood) in determining wellbeing at 50?

This paper is a preliminary exercise: it aims to set out a brief overview of the existing literature and to summarise some very early findings from new research based on a large longitudinal dataset from Britain.
1. Literature

In this literature review papers are discussed which contribute either to how individuals engage in learning over the lifecourse, or to the relationship between learning and wellbeing.

**Learning Trajectories**

Theoretical models of adult participation in learning highlight both the socio-economic context in which decisions about participation are made and the formation of attitudes to learning formed by family and school background factors (Cross, 1981; Darkenwald and Merriam, 1982). Some accounts emphasise that learning is ubiquitous across the lifecourse (Biesta, 2008), while other researchers suggest sharp declines in learning activity as people grow older (Macleod and Lamb, 2008; Boeren et al, 2010) and that some people participate very little in learning in adulthood.

An important contribution to the empirical literature on learning trajectories was the project *Patterns of Participation in Adult Education and Training* was undertaken 1996-99 as part of the ESRC’s *Learning Society* programme. The research was summarised in a range of publications, including Gorard and Rees (2002); Gorard et al, (1997; 1998). A questionnaire survey of people aged 16-65 living in industrial South Wales was a major component of the project (other elements were in-depth interviews with a sub-sample of cases and some historical research). Three localities in the region were selected for the: Blaenau Gwent, a mining area; Neath-Port Talbot, representing an area of heavy industry; and Bridgend, where light industry predominated. The questionnaire survey yielded 1,104 cases with an education and training history, and the researchers developed a typology, distinguishing between non-participants who did not go into any form education after compulsory schooling, had no engagement in education in adult life, and had not done any substantive work-based training; delayed learners, people who had left education at the earliest point, had no training until at least age 21, but then had at least one substantial episode of education or training in adulthood; transitional learners, a group of people who moved into full-time education or work-related training immediately after the completion of compulsory schooling, but then had no subsequent education and training; and lastly lifelong learners, a group of people who had both transitional and subsequent learning episodes.

Logistic regression was used to identify characteristics of those belonging to each group (relative to a base of all the other groups). Determinants in the model including age, gender, family background (such as education level of parents), educational attainment at school, and place. For example, non-participants tended to be older, to be from families with little formal education, to have attended a secondary modern school, were female, lived in Blaenau Gwent. Delayed learners were likely to have attended a minority type of school (e.g. denominational, technical, fee-paying) rather than grammars or secondary moderns. Transitional learners were
more likely to be male (relative to non-participants) and somewhat younger than non-participants, also less likely to live in Neath-Port Talbot. Those classified as lifelong learners tended to be male, had been to grammar schools, had obtained qualifications at school and subsequently, and came from families with relatively high levels of education.

An important component of recent adult education policy in England has been to increase the percentage of adults holding (at least) a ‘level 2 qualification’. Here this level 2 qualification means obtaining a qualification which is equivalent to successful completion of secondary education. Many people, especially older ones, did not obtain such qualifications during their schooling but may still acquire them in adulthood. Sabates et al (2007) used data from the National Child Development Study (NCDS) to investigate who achieved level 2 qualifications in adulthood. Specifically they looked at those who did not have a level 2 qualification by age 23 and analysed determinants of getting one by age 33; and then a similar exercise for obtaining a qualification by age 42 among those who were below that level at age 33. The advantage of NCDS was the rich background data on each cohort member. In analysing progression to Level 2 between 23 and 33, Sabates et al were able to include social background of the child at birth in 1958, features of the child at age 7 at an early stage of schooling, changes in attainment and behaviour from ages 7 to 16, learning activities between ages 16 and 23 and contextual factors at age 23 such as employment status. Between ages 33 and 42 they added learning between 23 and 33 and contextual factors at age 33. The researchers applied probit regression models with whether attained Level 2 between ages 23 and 33 as the dependent variable and a wide range of explanatory variables. Obviously those who already had a level 2 qualification by 23 were excluded from the sample. Variables in the model were ranked in importance according to their standardised beta coefficients.

The key finding was the importance of variables reflecting attainment and behaviour in school on adult learning. Those who obtained level 2 between the ages of 23 and 33 were likely to score well on attainment tests at age 7, to improve relatively between the ages of 7 and 16; to stay on at school at 16. Parental expectations while the cohort member was at school were also an important predictor of attaining Level 2 between 23 and 33, as were some post-school variables such as receiving training between 16 and 23, and participating in courses leading to qualifications between 16 and 23. Even for obtaining level 2 by age 42 school factors, including attainment, continued to be major determinants. In discussing the policy implications of their results, the authors emphasise the role of attitudes to learning and the need to influence those, rather than just economic or social constraints on participation in learning.
Learning and Wellbeing

The impact of learning on wellbeing is a relatively new topic in educational/social research and accordingly literature is still quite sparse (Field, 2009). Feinstein and Hammond (2004) used data from the National Child Development Study (NCDS), a cohort study of people born in Britain in 1958, to examine the links between adult learning and life satisfaction or happiness amongst adults in their 30s. They considered how participation in learning was associated with changes in life satisfaction, controlling for level of prior education and a range of other relevant factors. Their key finding was that adult learning did appear to have an influence on life satisfaction. The effects did not look particularly large, but as there were few changes in life satisfaction for people in their 30s the effect of adult learning was nonetheless important.

There is evidence that participation in adult education is associated with improvements in aspects of psychological wellbeing, especially self-esteem and self-confidence. The analyses of NCDS data by Feinstein and Hammond (2004) and Hammond and Feinstein (2006) found robust associations between participation in adult learning and increases in self-efficacy, even after controlling for a range of variables reflecting family and social background, prior education level and current circumstances. The large-scale qualitative research exercise of Schuller et al (2002), which involved interviews with adults who were participants in adult education, showed that many respondents reported improvements in psychological wellbeing stemming from their engagement in adult learning. This often took the form of increased confidence leading to their becoming more active socially or being able to confront, rather than avoid, issues that had troubled them. Sabates and Hammond (2008) summarise a range of course evaluation studies, mainly occurring in England. These included courses in higher education taken by mature women, adults participating in access and higher education courses, adult returners to education, and courses offered to adults with chronic health problems. These were shown to have led to various improvements in measures of psychological wellbeing, notably self-esteem, self-efficacy and self-understanding. However, it should not be concluded that adult education invariably has beneficial effects in the domain of psychological wellbeing. Sabates and Hammond (2008) caution that sometimes learning may actually undermine psychological wellbeing. This might occur when individuals are not ready for the learning experience, or where the type of material or pedagogical style are not suitable for them. Some qualitative researchers, notably Schuller et al (2002), report a lowering of self-esteem occurring in this fashion for some individuals in their sample.

Most of the evidence to date on the benefits of adult learning for health and wellbeing can be characterised as short-term in nature in that it focuses on the change in wellbeing between two waves of a survey or immediately at the end of a course of study. It has also mostly been concerned with adults in their 30s or younger. There is, nonetheless, some work on older adults. Jenkins (2011a) used longitudinal data on a large sample of adults aged 50 and above, investigating the benefits of learning over a two- to five-year period. A key finding was that participation in music, arts and evening classes was significantly associated with increased
subjective wellbeing. Formal, probably vocational, courses were not significantly associated with wellbeing, after controlling for other factors.

There is also some qualitative research on older adults, mostly on older adults who are post-work i.e. in retirement and the role that learning can play in maintaining health and social contact. Notable qualitative studies include Narushima (2008) and Withnall (2009). Both conducted in-depth interviews with older adults who were post-work, Withnall in the UK and Narushima in Canada. And both found their respondents reporting that participation in learning had a range of benefits including intellectual stimulation, increased wellbeing and motivation.

2. Data and Methods

Data from the National Child Development Study (NCDS) were used in this research. The NCDS contains information on all children born in Britain in a week in March 1958. Follow-up data collection took place at ages 7, 11, 16, 23, 33, 42, 46 and 50. The combination of detailed information on learning, on wellbeing and on childhood make NCDS an ideal data source for the project. In NCDS there is information on learning leading to qualifications, vocationally-oriented learning and leisure learning.

Learning over the adult lifecourse may be much influenced by attitudes formed during schooldays. Since NCDS participants have been followed since birth there is a rich array of information for analysis. Based on previous research, such as Sabates et al (2007), variables selected included test scores at ages 7 and 11, parental education and parental interest in the cohort member’s education, the cohort member’s own interest in education and attainment by age 16. Sets of explanatory variables will be used as predictors of educational trajectories.

Wellbeing is a topic of much interest in current social science research and various measures and various measures of subjective wellbeing have been developed. One which has been widely used is the CASP-19 quality of life measure developed by Wiggins et al (2004, 2008). This was designed specifically to assess quality of life of older adults and covers the four domains of control, autonomy, self-realisation and pleasure. Subsequently two 12-item versions were developed by a process of item elimination and the second of these versions (CASP-12v2) combines the domains of control and autonomy as shown in Figure 1. CASP12v2 is available in the NCDS data at age 50 and will be used as the measure of subjective wellbeing in early old age in this paper.
FIGURE 1: ITEMS IN CASP12-V2

CONTROL & AUTONOMY

- My age prevents me from doing the things I would like to do *
- I feel that what happens to me is out of my control *
- I feel left out of things *
- I can do the things I want to do
- I feel that I can please myself what I do
- Shortage of money stops me doing things I want to do *

SELF- REALISATION

- I feel full of energy these days
- I feel that life is full of opportunities
- I feel that the future looks good for me

PLEASURE

- I look forward to each day
- I feel that my life has meaning
- I enjoy the things that I do

* reverse code

Here wellbeing at 50 will be analysed as an outcome in multiple regression models. The objective will be to discover, first, whether learning has an impact on wellbeing at 50 after allowing for other factors and, second, whether the various learning trajectories have differential effects on wellbeing.
3. Describing participation in adult learning to age 50

As the interest is in learning during the adult lifecourse, the sample was confined to those cases who were present and had data on learning at all adult waves (waves 4 to 8) of the NCDS. The sample consisted of 6,381 individuals. Data on learning in NCDS includes information on the acquisition of qualifications, participation in vocational training and participation in non-vocational (i.e. leisure) courses. So it was possible to investigate whether or not adults undertook each of these types of learning between ages 16-23 (using data from wave 4), 23 to 33 (wave 5), from 33 to 42 (wave 6) and from ages 42 to 50 (using data from waves 7 and 8) to build up a picture of the extent of participation from the end of compulsory education through to the beginning of early old age. When considered in this way it soon became apparent that the set of non-participants was a very small one indeed. Almost everybody engaged in some form of learning between the ages of 16 and 50. Only 2.5 per cent of adults in the sample – or 157 cases out of 6,381 – did not participate in any of the three forms of learning at any of the (adult) waves of the survey.

Another, perhaps more informative way, of splitting up the sample is to consider the group who participate in one or more forms of learning at every adult wave of the survey. Let us call the group who do so the persistent learners. Just over a quarter of the sample, 27.3 per cent, were persistent learners on this definition. The proportion was slightly higher amongst women, at 28 per cent, than among men, at 26.5 per cent. Initial education may be a predictive factor for adult participation. There was confirmation in the data: those who had obtained qualifications by age 20 were much more likely to be persistent learners in adulthood, compared to those who had obtained no qualifications by age 20.

A large proportion of the sample, over four-fifths, obtained at least one qualification during their adult life i.e. from age 16 to age 50. Rather more men did so (86.6 per cent) than women (79.6 per cent). As for vocational training, here too there was a higher level of participation among men than among women. Overall some 89 per cent had participated in vocational training during adulthood. Participation in leisure learning courses was lower than for vocational training. About 72 per cent had taken a leisure course at some time from age 16 to age 50. This time the proportion of participants for females than for males at 76 per cent and 67 per cent respectively.

This exploration of the data on adult participation in learning suggests, firstly, that almost everyone participates in some form of learning at some point between the ages of 16 and 50. The non-participants were very few in number. Secondly, there was variation by gender. Men were more likely than women to participate in the acquisition of qualifications and vocational training while women were more likely than men to have participated in leisure courses. Thirdly, educational attainment by age 20 was associated with all forms of learning, and with the likelihood of being a persistent learner, that is someone who engaged in learning at all stages of adulthood from the end of compulsory schooling to early old age.
4. The childhood antecedents of wellbeing at 50

To what extent do experiences early on in life determine wellbeing at age 50? In order to tackle this research question a set of variables were selected from the childhood of each member of the NCDS cohort and entered into regression models for subjective wellbeing at age 50. These explanatory variables were entered in stages beginning with some from the original age zero NCDS survey then adding more in from the sweeps at ages 7, 11 and 16. The variables chosen include gender and social class, experiences of school, attainment test scores social and behavioural adjustment and measures of poverty in childhood. See Figure 2 for a listing of the variables and the sweep at which they were measured. As there were so many variables we also dropped non-significant variables in a series of steps to arrive at a parsimonious specification, also listed in Figure 2.

**Figure 2: The first sixteen years: Listing Variables in Regression Models for CASP-12 v2 at age 50**

<table>
<thead>
<tr>
<th>Sweep 0</th>
<th>Sweep 1 (age 7)</th>
<th>Sweep 2 (age 11)</th>
<th>Sweep 3 (age 16)</th>
<th>Parsimonious spec</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td>Attended nursery/pre-school</td>
<td>Free school meals</td>
<td>How often CM reads</td>
<td>Age 0: Mother’s age</td>
</tr>
<tr>
<td>Mother’s age</td>
<td>Happy at primary school</td>
<td>Financial hardship</td>
<td>Attitudes to school</td>
<td>Social class</td>
</tr>
<tr>
<td>Social class</td>
<td>Freq mother reads to child</td>
<td>Pupil intentions re staying on</td>
<td>Free school meals</td>
<td>Age 7</td>
</tr>
<tr>
<td></td>
<td>Mother’s interest in CM education</td>
<td>Mother’s interest in CM education</td>
<td>Financial hardship</td>
<td>Housing tenure</td>
</tr>
<tr>
<td></td>
<td>Housing tenure</td>
<td>Rutter scale</td>
<td>Attended multiple schools</td>
<td>Arithmetic test score</td>
</tr>
<tr>
<td></td>
<td>Reading test score</td>
<td>Bristol soc adjust scale</td>
<td>School gender</td>
<td>Bristol soc adjust scale</td>
</tr>
<tr>
<td></td>
<td>Arithmetic test score</td>
<td></td>
<td>School type</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Bristol soc adjust scale</td>
<td></td>
<td>Parental expectations</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>re staying on</td>
<td></td>
</tr>
</tbody>
</table>

The main message to emerge from these analyses is summarised in Figure 3. This shows that, even with many explanatory variables in the model, the adjusted R-squared was always well below three per cent. In the preferred parsimonious specification it was just 2.3 per
cent. In other words, it is clear that these childhood antecedents account for only a tiny proportion of the variation in subjective wellbeing at age 50. It seems that childhood events and experiences can explain very little of the wellbeing of people reaching early old age.

**Figure 3: The first sixteen years: Outline of Regression Results for CASP-12 v2 at age 50**

<table>
<thead>
<tr>
<th></th>
<th>R²</th>
<th>Adj R²</th>
<th>N</th>
<th>Variables</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sweep 0</td>
<td>0.01</td>
<td>0.01</td>
<td>8,246</td>
<td>Sweep 0</td>
</tr>
<tr>
<td>Sweep 1</td>
<td>0.024</td>
<td>0.021</td>
<td>7,382</td>
<td>Sweep 0</td>
</tr>
<tr>
<td>Sweep 2</td>
<td>0.027</td>
<td>0.020</td>
<td>5,160</td>
<td>Sweep 1</td>
</tr>
<tr>
<td>Sweep 3</td>
<td>0.042</td>
<td>0.026</td>
<td>3,076</td>
<td>Sweep 1</td>
</tr>
<tr>
<td></td>
<td>0.027</td>
<td>0.023</td>
<td>4,559</td>
<td>Sweep 2</td>
</tr>
</tbody>
</table>

5. **Major influences on wellbeing at age 50**

Given that experiences in childhood appear to have rather little impact, what then are the main influences on subjective wellbeing at age 50? The relationships between the CASP12v2 score and several variables measured at age 50 were analysed, at first by simple exploration of the data and then in multiple regression models. In principle, the CASP12v2 measure can vary between a minimum of zero and a maximum score of 36. In the NCDS age 50 data a small proportion, some 1.4 per cent, had the maximum score of 36 while the lowest reported score in the data was two. The median score was approximately 27. This wellbeing measure tended to be slightly higher for women than for men at age 50 (see Figure 4). It differed considerably by economic status, as can be seen in Figures 5, and also by self-reported health status, with mean scores of 29.5 among those in excellent health but just 19 for those in poor health.
Figure 4: CASP-12, by gender

![Box plot showing CASP-12 scores by gender](image)

Figure 5: CASP-12, by current economic status

![Box plot showing CASP-12 scores by economic status](image)
A set of explanatory variables, measured at age 50, were then entered into regression models. The variables here included self-reported health, economic status and financial circumstances. After controlling for a range of other factors, financial circumstances had a substantial impact on subjective wellbeing. Those who reported their financial situation at age 50 as ‘quite difficult’ or ‘very difficult’ scored some five or six points lower on the CASP12v2 measure of wellbeing on average compared to those who reported that they were ‘living comfortably’. Employment status was also associated with wellbeing. Average CASP 12v2 scores were about one point lower for those who were unemployed and 1.7 points lower for the sick/disabled relative to the base category in the regression model, the employed. Health was also important, even after controlling for other factors. Relative to the base of very good self-reported health, those in fair health tended to score about five points lower and those in poor health some seven points lower on CASP12v2. There were also statistically significant associations with frequency of visiting friends and with practising religion although the size of the effect for religion was quite small, at about one-third of a point on the mean wellbeing score. Overall, the multiple regression model accounted for a substantial proportion, about one-third, of the variation in subjective wellbeing at age 50.

6. Participation in learning and wellbeing at age 50

The final stage of the analysis was to investigate whether adult learning had any impact on wellbeing at age 50. Regression analysis was used to address this question. The methodological strategy was quite straightforward. The relationship between adult learning and wellbeing was considered in a basic regression model with no other explanatory variables, as a first step. Then further explanatory variables were added to the model to see if the relationship between adult learning and wellbeing at 50 was still statistically significant when these control variables were included. The controls were the set of variables described in the preceding two sections consisting of measures from childhood and from the major influences on wellbeing at 50, such as self-reported health, economic and financial status at 50.
What about other types of learning, or the extent of engagement in learning overall – did they have any impact on wellbeing? These hypotheses were investigated. The variable for leisure learning was included in regression models for CASP12v2, the quality of life response variable. Here leisure learning was not significant in the presence of control variables. The number of different types of learning (qualifications, vocational, leisure), up to a maximum of three and learning intensity, defined as the number of types of learning in which the individual participated multiplied by the number of NCDS sweeps at which they were observed to participate, were also added to regression models for wellbeing (CASP12v2). Again these results are summarised in Figure 6 above. In the presence of the full set of controls, there was no clear relationship between the number of types of learning undertaken and wellbeing at 50. The handful of people who did no learning at all tended to have significantly lower wellbeing. As for learning intensity, there was evidence of a positive relationship with age 50 wellbeing, even when the full set of childhood and age 50 control variables were included in the statistical model. This provides, then, some evidence in support of the hypothesis that learning over the lifecourse to age 50 is associated with the level of wellbeing.
Conclusions

Our review of the literature suggests that the evidence base on learning over the lifecourse and its relationship to wellbeing in later life is quite limited. Few articles have been published in this field. The NCDS data seems to have the potential to contribute here and in this paper we have shown that it is indeed feasible to obtain interesting and useful information about learning and its long-term association with wellbeing from this longitudinal dataset.

The preliminary findings described here reveal that most people participate in learning at some point in their adult learning to age 50. There were very few non-participants. There appeared to be some differences in the extent and nature of participation by gender and by the level of educational attainment reached in early adulthood. And there is evidence that learning participation may have an effect on wellbeing at 50.

However, this research project is currently at an early stage and any conclusions drawn from the research so far must be both tentative and provisional. There is much work to be done both to extend the findings and to ensure the robustness of the results. Three topics stand out as particularly important. Firstly, to combine the individual learning pathways into a plausible set of learning trajectories. Secondly, to tackle attrition from the sample. And thirdly, there is the need to specify and test a theoretical model of the mechanisms through which learning may impact on wellbeing.

References


UK CES (2009), *Employee Demand for Skills*.


Family changes and the role of intergenerational learning

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Abstract
The paper is based on supposition that changed structure of the contemporary families influence changes in the relationship between generations in the family, their mutual cooperation and learning. We presume that family remains important factor of socialization in the life course and that social learning is the key element in this process.

Researchers (Popenoe 1993; Laszloffý 2002; Vollenwyder idr. 2002; Bengtson 2001) have ascertained that due to the decline of the nuclear family, its primary functions (child upbringing, social support and companionship) cannot be performed good any more and were transferred to other institutions – schools, social institutions, enterprises, etc. Demographic changes (longevity) influences rising rage of the three-, four- and even five-generational families. The time individual is ‘playing’ certain family role (for instance grandparents’ role) is prolonging (Putney, Bengtson 2003; Attias-Donfut, Segalen 2002). Although we perceive different families and family relations, which influence high level of independence (and alienation) of individual biographies of family members, research still confirm that individuals are somehow involved in different forms of family cooperation, communication and collective life.

In the article we define intergenerational socialization as lifelong, mutual, two-way influence between generations inside family, going on in changing social and historical conditions (Kemp 2006). The research process of family socialization is based on symbolic interactionism in the sense that individual is defined by communication and interaction in social relations with
important others (intrapsychical and interpsychical social relations) The relation between social and personal identity (Goffman 2008) is determined due to the divergence in individual’s biography and socially created experiences (Jarvis 1992).

In the paper we examine whether intergenerational learning in the family is integral process, including cognitive, emotional and social components (Illeris 2004). Wenger in his ‘Social theory of learning’ expose individual’s and group’s experiencing of life meaning and the fact, that learners share historical and social sources, networks and perspectives, which is the reason to persist in common activities (Wenger 2009).

We used the ideographic approach for the individual case studies, through which we analysed the gathered qualitative data (semi-structured interviews). In this analysis we searched for connections between the structure of the family, mutual connections between family members and intergenerational learning.

From the case studies analyses we can comprehend the association between the frequency of contacts, communication, and intensity of relations between three generations and the transmission of values and reciprocal learning in the family. The findings confirm the connection between the relational closeness, inclusion in the social environment, and the mutuality of help, cooperation, and learning in the family. We can ascertain that learning in the family is connected with life problems; it is an integral process, which includes cognitive, emotional, and social components. The research also confirmed that generally in every family some kind of learning is happening; learning reinforces cooperation and giving power between generations, or at least contributes to reestablishment of interpersonal relations.

**Keywords:** family, intergenerational learning, social learning, social roles

**Introduction**

In the last century families confronted important changes – in age structure as well as in generational formation, in multitudes of forms and functions, and in expectations of family members with regard to their relationships. Changes appeared due to the social, economic, demographic, cultural, and political factors, amongst them longevity, the crises of the social and health care systems, the emancipation of women, the intensification of individualism, secularization, the crisis of employment, migration, and numerous others.

Many authors (Bengtson, 2001; Laszlofy, 2002; Popenoe, 1993) have posited that from the sixties of the preceding century the nuclear family has been in decline. This raised debates about the stimulation of cooperation, solidarity, and mutuality between generations in the family and in the society in general. Social transitions between generations are important for transmission of heritage and knowledge, but today intergenerational learning is often hindered.
In this paper we discuss changes in the (western) family, the connectedness of intergenerational learning, socialization, and communication. In the research we analyze the perception of three generations’ about mutual learning and cooperation, the influence of family members' interconnectedness on understanding, and the contents of mutual learning between the three generations.

1. Changes in the family

Social theoreticians understand and interpret causes and consequences of family changes differently. Some authors claim that in the process of modernization the ‘family’ gradually transformed from an extended family, which was the predominant form in the preindustrial societies and initial phases of industrialization, to a small nuclear family. The process of transformation was connected with specific economic and cultural circumstances in the industrial society (Putney & Bengtson, 2003, p. 150). Other authors counter that the extended family is now as present as it was in the past and that nuclear families were always the predominant type of family in developed western societies (Harris, 2007, p. 155). Defenders of the idea that the nuclear family evolved from the extended family in the industrialization era claim that at that time new social institutions developed and took over many of the family functions. It influenced the changing functions of the family from socially-institutional to emotionally-supportive, which is typical for the modern nuclear family (Burgess, 1960, in Putney & Bengtson, 2003). Burgess named such a family a ‘companionship family’, which is a system of interactions, influenced by each family member. The behavior of one family member can be understood only through the relations and unchanged patterns of interaction with other family members, in relation to the development of personality through these interactions.

One of the reasons for family changes is longevity, which lately influences the rise of three-, four-, and even five-generational families (Putney & Bengtson, 2003, p. 149). Today’s families have more members of older than younger generations, and family relationships can last for more decades (Attias-Donfut & Segalen, 2002; Bengtson, 2001). Family changes are presented as a heterogeneity of family forms – besides biological bonds also other kin relations are becoming important; families are reorganized, new types of families are reestablished.

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1 Murdock defines ‘extended family’ as a family, bigger than a nuclear family, and can be extended vertically (with adding members of different generations) or horizontally (adding members of parent’s generation, for example aunts, uncles, other couples) (in Haralambos & Holborn, 1999, p. 325-326). Extended family can also be defined as a family composed of more nuclear families with extended relationships in a way that it becomes a three- or more-generational family (couple, their children with partners or without them, grandchildren) (Harris, 2007, p. 155).

2 A nuclear family constitutes at least two generations; early definitions describe a nuclear family as the smallest family entity, composed of “an, woman, and their immature descendants” (Haralambos & Holborn, 1999, p. 325; Harris, 2007, p. 155), while later definitions define it as a family, consisting of one of the parents and a child.

3 For instance, relations in binuclear families, when because of new partnership/marriage the family is extended with new kin – children from previous relations, parents of the new partner, as well as other kin.
Women’s emancipation and intense migrations are contributing to intensive changes in the family and its cultural diversity.

Some theoreticians from the structural-functional theory emphasize the positive meaning of the small nuclear family, which signifies the separation of generations. Authors claim that in such a family younger generations are more occupationally flexible and increase their own economic development. But, empirical research from the sixties (especially in USA) shows that adult children were not even in the case of great geographical distances – isolated from their parents but were very much connected with mutual help (Rosenmayer & Kockeis, 1963, in Silverstein & Bengtson, 1997, p. 431). Family sociologists asserted that the extended family preserves intergenerational cohesion.

Although the data shows that public transfers are mostly earmarked for older people (social care), the situation in the family is the opposite; more intergenerational support goes from older to younger generations. Different data (SHARE, LSOG) (Bengtson, 2001; Gauthier, 2002) support these findings and confirm that it holds true for financial as well as for social support from older to younger generations in the family; older people give much more different kinds of support (financial, emotional, material, etc.) to children than inversely (Albertini, Kohli & Vogel, 2007, p. 322). Researchers thus claim that also in new social situations and adjustments to change multigenerational families still perform their function, with help of latent kinship.

2. Cooperation and learning in the family

Family remains the key socialization factor through the life cycle. Intergenerational family socialization can be defined as lifelong mutual influence between generations inside the family, occurring in changed social and historical circumstances (Kemp, 2007, p. 859); it involves (both-way) intentional and unintentional transmission of positions and behavior between generations (Uhlenberg & Mueller, 2003, p. 126).

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1. The number of divorces and afresh marriages are on the rise, and consequently the share of newly reestablished families, one parent families, and unmarried couples, is growing. Besides a modified, extended family there are binuclear families, “beanpole families,” mixed families, gay, and lesbian families (Harris, 2007, p. 156), reorganized families, also social parenting.

2. Women gain possibilities of independent earnings, more support from kin (grandparents, especially grandmothers taking care of their children) and more state support, so they can afford a separate (independent) life. Beck (2009, p. 169), on the contrary, describes the circumstances of these changes as the “growing poverty of single parent families (especially single mothers’ family) who are forced – besides getting a job - to ask for state social support.” This shows a fragility of law and family supply.

3. Silverstein and Bengtson (1997, p. 430) claim, that the modern economy supports the separation of the nuclear family from older kin, which demands the functional adjustment of old and young.


5. The process includes relations between all family members: children and adults, grown up siblings, adults from different generations, etc.
The research of socialization in the family community can be based on conceptualization of interpretative paradigm of symbolic interactionism (Berger & Luckmann, 1988; Mead, 1997). Constant interaction processes enable reinterpretation of the social meaning of acts, situations, and expectations of different family members. Due to the theory of symbolic interactionism an individual is formed in social interaction and communication in social relation, and in confrontation with important others. Family members’ behavior is not a consequence of prescribed roles, but a result of mutual acts of family members and interpretations of meanings of social situations, where it is evaluated, confirmed, and rejected⁹. For explanation of relations between family members “Theory of social exchange” can be used. This theory defines relations between involved actors and mutual interdependence (Silverstein, Conroy, Wang, Giarrusso & Bengtson, 2002, p. S4). The act of giving to others and setting conditions for later return is social glue, which promises stability and solidarity in small groups, therefore in the family. Exchange with another person enables emotional support; exchange can be moved to a later period and it’s not necessary equivalent to the investment. Čačinović Vogrincčič (1992, p. 76) asserts that in the family this process is influenced by internal and external variables¹⁰.

The family structure is simultaneously kept by everyday’ relations and rituals amongst family members, and especially by different representations of those interactions, where family can be the unit for solving problems, even crises (Fitzpatrick & Ritchie, 2004, p. 577). Social learning in the family is strongly connected with existent interaction, communication and the quality of relations in the family, and is an integral process – which includes interaction and internalization of what is learned. It is comprised of cognitive, emotional, and social components, which are closely interconnected¹¹ (Illeris, 2004, p. 19). Learning is the divergence between personal biography and socially constructed experience; through the process of self-questioning and learning by experience an individual”s identity is formed¹². So, family learning could be defined as reflective, experiential learning or the learning of social skills, and the connection of ‘being’ and ‘becoming’ (Jarvis, 1992, p. 76-78). Wildemeersch defines social learning as “combined learning and problem-solving activities, going on in cooperation systems, like groups, social networks, movements, which influence the level of social responsibility” (Wildemeersch, 1999, in Illeris, 2004, p. 135). Similarly, Lave (2009) describes the learning process in the

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⁹ Socialization in the family is not single internalization of social and cultural norms in personal subjective structure, but an interpretative activity, which include the whole life history of individual. Performing of certain (family) role and understanding of this role could be changed through influences of expectations of individuals or expectations of important others.

¹⁰ External variables are for example: the complexity of environment, social norms and values, the economic situation of family, kin, and friendship networks, etc. Internal organizational variables are: differentiation of family roles, structure of power, structure of emotions, structure of communication, etc.

¹¹ The cognitive learning process in the family includes acquiring skills and knowledge, an emotional component that comprehends interpersonal energy, and is transmitted with emotions and values. But, learning is also a social process, social interaction, which includes the interaction between an individual and their environment, and is influenced by social context, where it is happening.

¹² Carl Rogers defines it as significant learning, because it covers the whole personality (Rogers, 1994).
family as activity, reflection, communication, and negotiation among included members. That learning happens every day, demanding full responsibility of the individual for gained knowledge and skills, since there is no curriculum. Learning is personal, teachers are relatives. It is learning by observing and imitating; it is a tradition, perseverance, and continuity. By ‘Theories of situated everyday practice’ (Lave, 2009, p. 201) learning is defined with informality and occasionality; it is happening when day-by-day people confront different issues in their life and relations, being motivated by the wish to understand the processes surrounding her/him. There are plenty of choices, how to live a quality life; learning involves understanding, insight, emotions, and opinions. Also, Wenger (2009, p. 211) understands learning as social phenomenon; his “social theory of learning” indicates that learners in the family experience the same historical and social sources, networks, and perspectives, which connect them in common learning activities. Family is a community, where common stories are created, agreements are formed, rituals are reestablished, history is built; it could be the space of love, hate, agreement, and disagreement.

3. Methodology and the sample

Qualitative research methods are especially suitable for research of family life in their different contexts; usually the samples are small and researchers deal with case studies of single families (Bengtson & Allen, 2004, p. 490). For the purpose of this paper the qualitative data was gathered within the research “Intergenerational solidarity in Slovenia,” is focused on cooperation, and the transfer of knowledge, values, mutual help, and learning in the family. The research was carried out in the spring of 2010. Each student described his family with the previously described guidelines, and as well selected an appropriate line of observation (student – one parent – one grandparent from the selected parent line) with whom he conducted two in-depth interviews. Questions in the conducted in-depth interviews were answered by parents and grandparents, but the first generation (students) filled in the questionnaire by themselves. We gathered the data and opinions of three generations.

In the sample there were 23 families, the questions were answered by 69 persons, 9 men and 60 women. The average age of the interviewees in the 1st generation was 24 years.

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13 The data was gathered by students from the 4th year of Andragogy studies at the Department of Pedagogy and Andragogy, Faculty of Arts, Ljubljana, who were especially trained for the conduction of deep, semi-structured interviews.

14 The basic research project, headed by Dr. Valentina Hlebec, is an ongoing project (2009 – 2012) (J5 – 2166), and is financed in its entirety by ARRS.

15 For purposes of simplification we will only use the male gender.

16 The questionnaires for the individual generations differed slightly for purposes of understanding, but they were comparable with regard to the contents.

17 In our sample women dominate, due to the fact that females prevail among pedagogy and andragogy students. In their interviews they were more likely to turn to their mothers and grandmothers. In the 1st generation there are 20 women, 3 men; in the 2nd generation 19 women and 4 men, and in the 3rd generation 21 women, and 2 men.
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(ranged between 22-35 years), of the 2nd generation 49 years (the youngest 42, the oldest 60 years) and the 3rd generation 75 years (ranged between 65-90 years). The level of education differs between generations\(^\text{1}\). In the generation of parents (the 2nd generation) 20 are still employed, 3 are retired, while in the 3rd generation all are retired.

The level of education differs between generations\(^\text{18}\). In the generation of parents (the 2nd generation) 20 are still employed, 3 are retired, while in the 3rd generation all are retired.

The gathered data was analyzed using grounded theory (Strauss in Corbin 1990), which enables the identification of key terms and shows the relations between them. This inductive methodological approach allows a deeper understanding of analyzed comprehension and viewpoints of interviewees and explanation of semantic relations between them. We’ analyzed the statements of all interviewees about their own understanding of intergenerational learning and the experiencing of it, cooperation and mutual help in the family, the connection between their comprehension of learning in the family and the evaluation of that learning.

The case studies of three families were chosen due to the intensity of mutual connectedness and communication between three generations in the family, and due to the inclusion of the family members into the community’s activities (openness/closeness). The used quotations are labeled with a research code (MSS), family code, fictional name, age of interviewee, and the mark of generation to which the person belongs.

**Tightly knit and close family**

A four member nuclear family (a father, a mother, and two children) lives in their own house in a village. Contacts with the grandmother (on mother’s side) and grandparents (on fathers’ side) are daily (phone calls), and family members visit them weekly. As the student described, mutual trust and respect exists in the family exists and they offer each other support and take care of one another. Members of the extended family are not involved in local community’ activities. This is clearly illustrated by the mother’s statement, in which she finds the events in the community insignificant; she has no wish to socialize with fellow citizens: "We have our family and friends, and that is enough for us."

We’ asked the members of three generations about the most important asset, value, or lesson, received from grandparents or another older person; their answers match to a high degree.

MSS-02-Maja-25-1: I received many lessons from my grandmothers and grandfather. There were especially many life lessons. Maybe the most valuable asset was that they convinced me to look for good in others.

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\(^\text{1}\) Most of the 2nd generation interviewees (40%) completed secondary school, 30% had a college or university degree, 21% went to vocational school (3 years), and 9% had a primary school education or less. Grandparents (the 3rd generation) have substantially lower level of education than their children (the 2nd generation); most of them (69%) completed primary school or less, 13% secondary school and only 5% a college or university degree.
MSS-02-Nataša-46-2: Mostly from my grandparents and parents, of course. Those were lessons about life, values such as respect for people, mutual respect, and others.

MSS-02-Ivana-69-3: I received a lot good things from my parents. I received knowledge, they taught me to respect others, I got values. I did not know my grandparents.

About the similar question, if they received any values or lessons from their children or grandchildren, a mother thinks that she can get a lesson only from somebody older than her or somebody as old as her; it’s harder to get one from younger people. A grandmother avoids answering. We can conclude that social learning in the family is understood mainly as a one way process, a transfer from older to younger family members and not the other way around. Mother admits that she learns from her children, but mostly from older family members.

MSS-02-Nataša-46-2: At home, I learn from my children... such as about computer or new computer programs, etc. One can also learn from older. You learn a lot by watching, listening to what they say to you, and learn from their mistakes. But you learn the most from your parents. Even today I learn a lot from my mother. My mother still tells me how was it when she was my age, what she did wrong then, so I can do it differently.

Grandmother also learns from youngsters in a family.

MSS-02-Ivana-69-3: Yes, I learn from young ones. I learned from youngsters how to use a cell phone, computer. My grandchildren, daughter and son-in-law have taught me by showing it to me.

A mother and a grandmother transfer their knowledge and experiences to younger family members; the grandmother concretizes the answer.

MSS-02-Ivana-69-3: Yes, I transfer. I tell them what I’ve read, which are the good herbs and when to take them, stuff like that. Those youngsters are my children, grandchildren.

About the reciprocity and mutual assistance between generations in a family, the interviewees responded similarly.
MSS-02-Maja-25-1: *As do we, younger ones, help the older members of our family, so do they help us. It depends on the situation, the case, and what kind of help it is.*

MSS-02-Nataša-46-2: *Reciprocity and mutual assistance were always present in our family.*

MSS-02-Ivanka-69-3: *Reciprocity and mutual assistance were present especially from my mother and my sisters (to this day). Assistance is, of course, present between me, my daughter, and her family. So this has always been here in our family.*

But in the following conversation, the grandmother shakes her statement about mutual assistance in a family, when she thinks about how nicely she took care of her aged parents, when thinking that young people don’t take care of her enough, that her role in the family isn’t important because she is a widow and lives alone. When she talks about it, her feelings of loneliness and isolation are noticeable despite the fact that she lives in a house next door to her children and grandchildren, and by the statement of the student, that they keep in touch with each other daily. The way she experiences her position is significantly different from the opinion of other interviewed representatives of the third generation, who are convinced that the possibility of living close to the other younger members of family, but in separate households, is a term for good relationships and understanding in the family.

**Disconnected family; different cooperation of family members in the community**

A student lives in a five-member family with a mother, stepfather, stepbrother, and stepsister. Her father died. The family lives in an apartment building in a town, the grandparents (on mother’s side) live in suburb in a house together with one of their daughters (students’ aunt with family). The student believes that there is no trust in the family. She is only emotionally attached to her mother. She estimates the communication between family members as insensible. Student has monthly contact with grandparents, but her parents have even less than monthly contacts with their parents, the student’s grandparents. Members of the family are not active in the community. The only person in the family who is active in the community is the grandmother. She has been active in a charity organization for a few years, and helps older and sick people with domestic care.

When asked what was the most valuable thing, value, or lesson, which she received from an older people person, the student mentioned her granddad. At this point she again mentioned the alienated relations in the family.

MSS-08-Nina-30-1: *I think that they, above all, taught me modesty. My favorite memory is about granddad; ‘I bring him slippers every day when he comes
home from work, while other family members “hardly” noticed that he came home.

The mother avoided answering the same question and talks about her early youth, when she was forced to be independent.

MSS-08-Irena-49-2: Oh, what do I know…maybe, there is nobody clever than I am (laughter). Yeah, let’s say, I had to be independent very early... as a young girl I earned money on my own, you know, when I was delivering newspapers, so I had to buy everything, clothes, and so on, on my own. I was independent and that’s obvious even today.

The Grandmother exposes her views about raising children and patterns of behavior she got from her mother, which she herself copies and repeats.

MSS-08-Olga-70-3: Well, I think that from my mother... how I should say this... our mother was a very decent women and raised us nicely. She was very caring, patient ... she didn’t show her weaknesses. I think I do the same. You know, my mother had five children... she worked all of the time, because we were without a father. She was truly a good person, very religious. So I would say that she transferred to me her goodness and...what else ... patience.

About receiving something valuable from her children, the mother says:

MSS-08-Irena-49-2: What is this?...hmm hmm...that you have to be fully confident in your life... to be able to achieve something, you sometimes have to trample down somebody and that you mustn’t let yourself being manipulated by others (laughter).

A member of the 3rd generation had an interesting opinion about her self-esteem.

MSS-08-Olga-70: Kapo di banda! (Laughter). I have my own car, my own money...I’m not dependent on others, others are more dependent on me... (Laughter). You know... as I said last time... yes, take care of me, so I don’t get hurt, otherwise the financial crises will hit us. They laughed so hard afterwards....

Mutual and reciprocal help between generations in the family is, in the opinion of interviewees, understood as one-way help, from older to younger generations in the family.
three interviewees speak exclusively about instrumental support, which is not mutual between generations.

MSS-08-Nina-30-1: As far as I know, (material) help from grandparents is in our family provided only to one (of three) daughters. The other children and grandchildren do not receive help.

MSS-08-Irena-49-2: If children help, or what? So to say...yes, children help a little. My mother helps as much as she can, she brings her own vegetables...this sort of help....

MSS-08-Olga-70-3: You know, I’m still very independent, I’m still driving, working; I help others, not the other way around.

About the learning from youngsters in the family the mother first of all answers negatively, though upon reflection she finds out, that by imitating her daughter she learns about resoluteness and self-confidence.

MSS-08-Irena-49-2: Oh my God, hmm, I don’t know, not that I would know of, that I learn something from the younger... Determination, self-confidence... yes, that is what I’ve truly learned... if you don’t like something, you immediately turn it up side down... and when I hear that I got the confidence and think I should also be more confident and determined, as you, don’t you think? So it is a kind of learning from life, modeling you....

The mother is also skeptical about learning from older people in the family, but later answers that she could learn about cooking from her mother.

MSS-08-Irena-49-2: What should I learn from them, I don’t know... yes, maybe for example from my mother about cooking; she is a master at it....

The grandmother says that she is still learning, because she has to be acquainted with current trends in the area of her interests and work, so she strengthens her intellectual abilities.

MSS-08-Olga-70-3: Yeah, I don’t know. Yes, actually I like to and I have to, there where I work. I have to be “up to date,” when I do bookkeeping for a private company. How can I say... I’m keeping my brain working, so... I don’t become senile, I’m not getting old...

A member of the 3rd generation transmits her knowledge and experiences selectively to one of her daughters; she doesn’t mention other, younger family members.
MSS-08-Olga-70-3: Yes, I transmit knowledge. I show bookkeeping to Mojca (daughter). And I tell her precisely how to take care of patients, so she can one day take over. Yes, I transmit, yes.

A mother transmits her knowledge and experience to her younger generation through conversation.

MSS-08-Irena-49-2: Yes, experiences, so that I speak with them as much as possible... I don’t know... for example, I always tell Marko that he should be responsible... that means if he makes a mistake he has to take responsibility and solve the problem. But not that mummy runs for his assistance.

From the selected case we can conclude that contacts between generations in the extended family are rare, alienation is predominant, and there is a shortage of warm and open relations. A member of the 3rd generation has tight, but on the other hand ambivalent relations with one of her daughters, who lives with her in the same house. In the family we notice curtailed intergenerational help and mutual learning, and interviewees experience mutuality as one-way process, going on from older to younger family members. A comparison of relations between a mother and grandmother who both finished secondary school, is interesting. The grandmother, who is still very active in the community, values lifelong learning very highly for her own activity and mental condition, which does not apply for her daughter.

Connected family: The community open family

A three-member, nuclear family (a mother, a father, and a daughter) live in a house in the centre of small town. Both grandparents (mother’s and father’s parents) live in the same community. Family members are tightly knit; contacts are daily as they live close. They trust and help each other financially and emotionally. They are also very close to their neighbors. In the students’ opinion every family member has a wide range of friends and acquaintances, with whom they spend a lot of time on holidays and celebrations. At bigger events (grape harvest, picking olives, and similar events) all the relatives and friends gather. Family members are very active in the local community (at cultural events and for the preservation of natural and cultural heritage, etc.).

The transmission of values and lessons from older to younger family members has been picturesquely described by members of three generations.

MSS-21-Anja-22-1: Both grandmothers and grandfather contributed much that I became what I am, because they took care of me before I went to school. I never attended kindergarten... My grandfather gave me the most important life lessons. I remember one of his wise sayings about our future if we don’t bridle our
greed... It says: be aware of the day when a sitting hen lays eggs in the afternoon, when judges will be beardless men and churchmen merchants.

MSS-21-Katja-46-2: From older people I have learned really a lot. They are full of knowledge and experiences; we just have to listen to them. It means the most to me that older people have presented honesty as a value to me. Besides they’ve talked a lot about nature and its preservation.

MSS-21-Majda-65-3: Granddads used to say that work is a value which gives power to the people. I remember my granddads as important, wise, and respected men.

A member of the first generation states that in the family there exists mutual and reciprocal help.

MSS-21-Anja-22-1: Yes. When anybody from the family needs help, others spring to assistance. In good and in bad moments, during sadness or illness.

A mother confirms that in the family there exists help from older to younger and the other way around.

MSS-21-Katja-46-2: From childhood on I was living and growing up in the same household with my parents and grandparents. My grandmother took care of me when my parents were busy. When they got older I took care of them. It is the same with my family. My parents took care of my daughter.

A grandmother agrees with her daughter and granddaughter.

MSS-21-Majda-65-3: Yes. Since I remember there have been grandparents and grandchildren in our house. They’ve played together, worked and cooked together, laughed, and rested. It is not important how old are you but how good is your heart (laughing).

A grandmother likes to learn from younger family members:

MSS-21-Majda-65-3: My grandchildren help me a lot. They taught me how to use a computer and cell phone. And my daughter fills in the documents I don’t understand. I can do lots of things on my own, but not everything; the world is changing so fast.
Another grandmother likes to help her younger family members with her knowledge and experiences. She is very satisfied when somebody uses her advice and achieves their goal.

MSS-21-Majda-65-3: Yes, if they ask me I willingly tell. Today I explained to you how to make juniper brandy.

From the answers it is clear that it is the connected family, open to the community, which cultivate intergenerational dialog. Family members who live nearby, unite a lot, mutually exchange instrumental, emotional, and informational support. It is the family, in which mutual help and intergenerational learning is comprehended literally; it goes from older to younger family members and all the way around.

Conclusions

From the case studies analyses we can comprehend the association between the frequency of contacts, communication, and intensity of relations between three generations and the transmission of values and reciprocal learning in the family. In the case of the family with strong connections between the members of three generations, mutual help is understood as something obligatory. A strong family network and a high level of trust in such a network reduce the need for organized education. In her research Strawn (2003, p. 57) has found out, that people with strongly knit family network are involved in occasional and informal learning inside this network and usually do not search for educational possibilities in the community. Our findings in strongly knit and closed family confirm these results; mother and grandmother are not interested in involvement in any kind of learning settings in the community, but on the other hand both report about mutual learning between three generations in the family.

Uhlenberg in Mueller (2003) state that readiness to reestablish community ties and the patterns of activities in the community are carried on from generation to generation, but also influence social learning in the family; that holds true especially if parents are active in the community and have a sense of belonging to it when their children are growing up. The findings from our research confirm that. In connected, community open family, interaction is intensive and learning goes both-ways. The exception is the case of relationally unconnected family, in which the member of 3rd generation is very active in the community, but other members are not. In this family communication is extremely weak and mutual learning is limited. In selected cases we can see the connection between the relational closeness, inclusion in the social environment, and the mutuality of help, cooperation, and learning in the family. Social learning, which goes on in the family, is closely related to interaction, communication, and the quality of relations in the
family. The researches on this topic confirm our presumptions and findings¹⁹ (Čačinovič Vogrinčič, 1992, p. 76).

Analyses of the interviews show that in most families the 3rd generation transmits values, such as honesty, perseverance, diligence, respectiveness, truthfulness, thriftiness, preservation of family tradition, as well as practical, useful knowledge and skills, like cooking, handcraft, educational advice to younger generations. Quite some of the interviewees from the 2nd and 3rd generations are of the opinion that they don’t learn from their younger relatives, and don’t take over their values. Other interviewees, on the contrary, state that younger generations give them a joy of life, optimism, teach them sincerity, kindness, and fearlessness, and that they also teach them practical things. As they say those are implicit learning processes that go on spontaneously during everyday work and conversation, by modeling, or demonstration. On the basis of case studies analyses we can ascertain, that learning in the family is truly an integral process – as defined by Illeris (2004, p. 19) – based on interaction; it includes cognitive, emotional, and social components, which are strongly intertwined. In this process learning is spontaneous and brings personal or significant learning (Rogers, 1994) connected with life problems. In the analyzed families a lot of occasional learning is going on, which could be explained by theories of situated everyday practice (Lave, 2009, p. 201). On the basis of mutual learning understanding, emotions and values of family members are changed.

We have noticed that in families, where open communication, cooperation, and mutual help and learning are present, the 3rd generation accepts their position as positive (they are important, respected, family glue); in the families, where cooperation and intergenerational help and learning is weak, older members of generation explain their situation with ironic and bitter statements, for example “I’m a housewife and nothing more.” Some of the interviewees (3rd generation) warn about the troubles in intergenerational understanding and communication. In the opinion of the 1st and 2nd generations periodic conflicts might be the result of different life principles of three generations.

The research results show, that in spite of the impression that in Slovenia the role and the functions of the family are weakening, inhabitants still highly value the family and its social support networks (Hlebec, 2009). Our research confirmed that in spite of different intensity of contacts and relations in various families, generally in every family some kind of learning is happening; learning reinforces cooperation and giving power between generations, or at least contributes to reestablishment of interpersonal relations.

¹⁹ Communication is more intensive in the stable relations and tightly knit families (Čačinovič Vogrinčič, 1992, p. 78); in unrelated families communication is weak and ineffective, but on the other hand in the exaggeratedly connected families communication can be so intense, that change is impossible.
References


Seniors Universities and learning pathways

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Abstract

The phenomenon of an aging population requires a restructuring of the very concepts of old age and of social policies that intervene in this area. Indeed, the role of education at this stage of life has often been ignored by political and social actors. On one hand, institutions dealing with senior publics have been more oriented to food, housing and health care providing. On the other hand, there is an emerging demand for new ways to rethink and live the "senior age" through constant and diverse learning. In this sense, the so-called Senior Universities play a distinguished role for those who attend these institutions, improving older adults’ life quality and preventing the existence of a life period without projects or initiatives.

The seniors’ motivations for its frequency and the impacts of non formal education situations experienced in these institutions are indicators that allow the questioning of lifelong learning importance. In fact, the number of seniors who decide to attend these spaces has been increasingly significant. Life does not necessarily have to be "inactive" after the end of a professional occupation. The retirement, as a new cycle of change, implies a reflection on the path to take, and the updating and / or the acquisition of knowledge may be one of these paths. Once the learning process is continuous and follows the human being throughout life, it is important to “energize" the senior adults’ pleasure to knowledge mobilizing and continuous development of their potential (physical, cognitive and social).

Thus, interpersonal and intergenerational relationships established at the Senior Universities and mental and cognitive stimulation also contribute to active and healthy aging, allowing exploiting new areas of interest and truly meaningful social roles. Often, those who once were valued enter a process of discrimination and exclusion, and it is essential to combat the devaluation of these
elder people by keeping a positive perspective of aging. Thus, the seniors’ pathways in these institutions have proved to be particularly significant, especially at the level of wellbeing (physical, psychological, social, emotional and mental), self-esteem and self-confidence, and adaptation to a new phase of their lives.

**Keywords:** lifelong learning, continuing education, active ageing, educational gerontology, seniors universities.

### Introductory Reflections

This Paper intends to present some considerations about the role of Education and Lifelong Learning in the senior population. On the one hand, the issue of the research focuses on the motivations of seniors who attend educational institutions (non-formal model), and the potential impact of these experiences. On the other, it is important to understand how learning influences the aging process. This research was made possible thanks to the analysis of the speeches of those who attend the so-called Senior Universities (Machado, 2011), in two of these institutions.

Thus, when confronted with an increasingly aging society, it is relevant to focus our research subject on this specific stage of life: find out who are the senior and recognize their skills. Etymologically, senior brings us to the oldest and most respected. However, is it current to find respect and even admiration for the senior, for the elders? Or does the "gerontocratic" concept of the past gave way to "younger players", i.e., the "overvaluation" of youth, devaluing the role of older generations in contemporary society (Osorio & Pinto, 2007: 8)?

### 1. Learning throughout life

According to the current European policies, the Lifelong Learning should "promote active citizenship and promoting employability" (European Commission, 2000: 6). In this economical perspective, what is the place of seniors who no longer play a professional activity? The end of an occupation does not mean the abandonment of a truly active life, or the lack of interest in learning. The designations of permanent, constant and lifelong imply that the educational process should not be (and he is not) limited to the school system or to a particular period of life. On the contrary, is an ongoing process, during which they acquired knowledge and skills that can and should be valued. Thus, the Senior Universities assume the role of facilitators of a lifelong learning process.

According to the NIS (Senior Research Center), within the one hundred and two of the existing educational institutions for the elderly in Portugal (NIS, 2008), fifty-four are called Senior Universities, eighteen have different terminology, sixteen call themselves Elderly Universities and
fourteen are *Senior Academies*. However, it should be noted that all of these data refer only to members of Rutis (Network of the Third Age Universities), i.e., the number of institutions, as well as the people who attend should be much higher (idem).

As for their management, the majority (59%) is associated with another institution (the House of Mercy, the parish and social centers). Regarding the number of students, the national total is seventeen thousand, four hundred eighty one, being that 78% are female and 22% male, which shows a clear minority of the senior men. Concerning age, most of the students (52%) is between sixty and sixty-nine years old, 28% have less than sixty years old and 20% more than seventy years old. However, it should be noted that all of these data refer only the members of Rutis (Network of the Third Age Universities), i.e., the number of institutions, as well as the people who attend them should be much higher.

### 2. Methodological Options

During the months of October and November 2009, there were seventeen interviews (semi-structured), and ten of the interviewed people belong to the Senior Academy of Gaia and seven of them to the Cultural Institute of Valadares. After some informal visits to these two institutions, an interview guide was created, taking into account the attended activities, the reasons for the application, the impact of the acquired knowledge, especially in this particular stage of life. Afterwards, the content of the speeches was analyzed and, therefore, a new speech was built from the voices of seniors (Machado, 2010). The categories and subcategories of this analysis were previously designed (*motivations, consequences of the experiences, learning by a senior perspective, perceptions of aging*), although in the course of this analysis new focus of interest for the research have arisen (the need to break free of obligations and the uniqueness of this kind of institutions, for example).

The need to "work the knowledge that people already have", rather than to "produce knowledge about the people objectified" (Berger, 1992: 25), justifies a more qualitative methodological approach. The intersection of a theoretical-conceptual with the analysis of the speeches allowed their dissolution and breakdown, as well as the creation of a new speech. Thus, the voices of seniors and their interpretation constitute the core of this work which aims not only to contribute to a better understanding of the pathways and experiences lived in these places, but also to explore how learning is viewed by seniors throughout their lives.
3. Content Analysis

Motivations for seniors

The interest in the updating of knowledge and acquisition of new knowledge was evidenced by a majority of interviewed people who decided to exploit its potential ("I always had a certain flair for crafts (...) Then, the little worm began to entrench inside me."). The expression always is clear in this and in other quotes, because after several decades spent having a certain job, the opportunity has finally arrived to engage what they value most, showing a continued interest by acquiring knowledge throughout their lives. This step is not experienced here as an end but as a beginning, "a time of opportunity (ies)" (Nascimento, 2009: 132).

For some of the interviewed people, the pleasure that comes from "hearing people", from "being together" and "making friends" is also an incentive to attend this type of places. One of the seniors "felt I had to make this investment" in the activities of the Academy, i.e., the very word investment is associated with a process of sharing and mutual support between Senior Universities and those who attend them. When confronted with the low participation of men, some interlocutors regard these institutions as a "refuge" and an "escape" from the routines and their "obligations" (family, home and business) which they have always had throughout their lives and still do. In this sense, the educational process developed by the Senior Universities can objectify the emancipation of those (especially those) who attend them: "I would become crazy if I just stayed home caring for old people"; "I force myself to have a bit of time for me, not just to be a grandma, or to work".

On the other hand, the need to follow timetables was a motivation mentioned several times during the speech of three seniors: "I felt that I needed to impose myself a schedule."; "Timetables are needed, with obligations."; "at home I can't do anything, I lost track of time with nothing to do, during those three hours I know what to do". In this new period in their lives, the perception of time is no longer the same: the routine is to be free, apparently with nothing to do. Time seems to be too much rather scarce, hence the importance of making good use of it by developing activities that contribute to the their development and cognitive, physical, emotional and psychosocial well-being, not being limited to leisure activities and assistance. The need to respect schedules and to occupy time with pre-set activities is justified by the importance of a "reconceptualization of time perspective taking him to see the future as the time left and not the time you have left" (Nascimento, 2009: 133).

Impact of the life experiences in the Academy and in the Institute

Thanks to the Academy and the Institute, the interviewed people have established a new network of friends and therefore they have gained access to new perceptions of reality, new knowledge and techniques. Interpersonal relationships play a greater role in this particular stage.
of life, adding new meaning, joy and feeling of being "alive", helping people to take and face life positively. The loss of ties with former co-workers and even children enhances the creation of an "other family". Thus, the Senior Universities allow their students to step away from isolation and loneliness, integrating themselves positively in society, promoting the "sociability through leisure" (Lima, M., 2001: 61).

The stay of these senior people in these educational institutions also contributes to their well-being. The inactivity inherent in the fact that they no longer pursue a profession, they make few moves and they no longer exercise their body (and mind) may disturb the functional balance of any person (Nunes, 1999: 160). Besides the health benefits on the physical level, it is also important to highlight the psychological, mental and emotional well-being: "I feel relaxed"; "good, excellent"; "relax"; "it's very good for the ego, the self-esteem". One interviewed person stated: "a person feels and suffers" [when he retires] and "when I retired, I felt a bit unregulated, as the body does, but then ... I found the Academy and I restored myself, so to speak.". Here is highlighted the role of the Academy on the recovery of identity and the exploration of new areas of interest and achievement. Another relevant statement (of the same senior) concerns the (non) development of seniors: "While we are young, the children look at us as gods... A person starts to get old... then we no longer count for anything. Society is beginning to put people in the gutter, if you have money, you still matter, having no money... ". As the years advance, the idea that fathers are divine will fade gradually, just as their potential starts to be questioned. In this sense, Senior Universities play an important role in the fight against the devaluation of those whose age is more advanced.

Similarly, the time spent at the Academy and the Institute represents a refuge, for some seniors, from their problems - "here we do not think about bad things ... I do not think about the downside of life". One of the interlocutors has repeated several times that teaching was an "escape"; he also used the term "gift"and he had the desire, at this stage of life, to just "be me", something so often delayed, always depending on others. The acquisition of new knowledge, he also said: "It is a pleasure"; "You learn new things as well (...) I did not do anything"; "Because every day spent here is different, always learning."; "I update myself, I discover talents (...) fills up my life."; "to look for life itself becomes different...". Each day spent at the Senior University represents a novelty, a stimulus and a challenge, through the ongoing review and the (re) discovery and development of skills.

**Learning paths in the lives of seniors**

Although the students’ educational level at Valadares and at the Senior Academy in Gaia is relatively high, it is not possible to conclude that Senior Universities are attended mostly by people who are very educated, rather than those with lower education levels. In addition to value the school career (and academic) of their children, some interviewed people expressed their
willingness to enter a higher education institution, since "some projects were left behind" and this is a "wake up" to new experiences.

Several seniors said they are "always learning" and that routine activities often prevent the acquisition of knowledge and awareness of acquired learning. The wisdom gained from the experience - the "university of life" (as mentioned by one interlocutor) - should always be valued and used. As a matter of fact, in the view of Canário (1999: 109), learning processes appear mainly as "articulated structure of different experiential moments that allow the subject to formalize implicit knowledge and not systematic." According to a senior, "when we're young who choose your colleagues depending on similar tastes or social environment, or even money", later "we socialize with people with similar professions", and at this stage of life "we are, or should be, all equal", "we do not need any certificate", "we are not the cleaning lady or the clerk, we are all students". Indeed, whether at the Academy or at the Institute there is no difference between students, there are no prerequisites for registration or certification of any kind. The most important is the willingness to learn and to live in order to optimize this stage of life.

When speculating about the importance of these places in their life paths, some interviewed people also expressed interest in differentiating the activities which took place there from those held in other institutions, particularly in day care centers and nursing homes. In fact, households were defined as "people warehouses" and day centers as places limited to activities such as "dominoes", "knitting" and "sitting around watching TV", and defined as "centers that welcome people who are amorphous ... whose goal is zero (...) they are waiting to die". This last interlocutor associates that apathy not only to the absence of goals in life, "permanent and constant motives of interest", but also because the activities carried out "do not totally fulfill the people", "they do not mind, do not give encouragement", i.e., they are reductionist, they reduce the person. The point may reside not so much in the education of seniors, but in the lack of alternatives to divert them from a life without work and without projects. Do the professionals who come into contact (directly or indirectly) with the senior citizens value their free time taking into account their interests and needs? The Order No. 12/98 establishes the rules regulating the conditions of installation and operation of nursing homes, with regard to food (Standard IX), hygiene and health care (Standard X), and building conditions (Rule XVI). However, there are no guidelines about the Permanent Education and / or Lifelong Learning. In addition, several rules are set for the proper functioning of households, but there are no suggestions that promote "the socio-cultural, recreational and occupational activities" (Standard III - d)).

Similarly, the Law-Decree No. 64/2007 reduces "social responses" (for seniors) to social centers, day centers, night centers, nursing homes and residences (Chapter I, Article 4. p. 1-b), devaluing the role of institutions such as Senior Universities. With regard to educational programs (formal and informal) aimed at senior citizens, "at present, it does not exist in Portugal, any active measure" (Martin, I. et al. 2007: 169). To prevent this, the Senior Universities and the continuous process of learning represent an important resource for active and successful aging.
Perceptions of aging

According to Vieira (1996: 52), aging is a "process of life, like childhood, adolescence and adulthood, it is marked by specific bio-psycho-social changes associated with the passage of time." Throughout the interviews, it became inevitable to refer to this later stage of life, although most interlocutors acknowledged that he was getting older, he or she did not consider themselves "old men" / "old women". On the contrary, before the terms "third age" and "old age" some seniors expressed the following perspectives: "it does not scare me", "it does not shock me", "old age is actually beautiful,"; "Sometimes I go to a café and I say «Oh, just old people», and I do not remember that I'm also old"; "I forget sometimes how old I am"; "my body is not what it was before but my head is... And I still feel very active"; "The body feels old but not the spirit".

In fact, despite the social conception of old age which result from the establishment of a chronological age, it becomes clear that it "has been losing some social sense, since the longevity and quality of life of these people will be changing" (Moniz, 2003: 39). Most seniors stressed the importance of working to address the less positive consequences of aging. Increased life expectancy and longevity involves rethinking new ways to consider the removal from a job position and the beginning of a retirement, that is, a new cycle of life directed in an optimistic way by recognizing their own capabilities and new activities, including the educational ones.

Final Remarks

Most interviewed people said that the interest in updating and acquiring new knowledge was a key stimulus to stay in the Senior Academy of Gaia and in the Cultural Institute of Valadares. Along with this motivation, as evidenced, there is the need for interpersonal relationships, to achieve or maintain well-being (at various levels), and keeping schedules. Indeed, these institutions provide a diversified range of activities, allowing to occupy a period of time formerly dedicated to the world of work. Another relevant aspect is one regarding the female speeches, as some interviewed women started to attend Senior Universities in the hope of obtained their freedom in relation to their family and professional roles which required an almost exclusive dedication.

Concerning the consequences of the life experiences in these places, it is possible to verify the optimum occupation of free time, the social relations, the acquisition of knowledge, the well-being and personal achievement of those who attend these type of institutions. These places do not impose restrictions (in terms of qualifications, for example) and provide various educational, cultural, artistic, sporting and leisure activities, taking into account the interests, needs, capabilities and the limitations of all the people who seek them. The small number of people with relatively low levels of schooling may be explained by the fact that many of them do not show a familiarity with the acquired learning in formal contexts, or throughout leisure
activities. However, the acquisition and mobilization of knowledge is a continuous learning process which follows the human being throughout his entire life.

Thus, it is important to promote the necessary conditions so that all people, throughout their existence, can embark on journeys of learning which will stimulate not only a lifelong development of skills and physical, cognitive and social abilities but also the positive adaptation to a new stage of life.

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“Signposts of life” – what we can learn from life histories of Polish senior immigrants to Sweden¹

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Abstract

Emphasis on lifelong learning at national and international level suggests that time is ripe to launch a more open discussion about educational opportunities for elderly people. Research has shown, that as we are becoming the “aging society”, we need to renew the outlook at the elderly. The perspective of being an elderly man has been shifted from issues of sickness in the Third Age to keeping health in good condition, emancipation and learning. Although the idea of the individual and collective responsibility to continue learning throughout life is certainly not new but the social, cultural, technical and political changes in the modern world, acquire new way of learning while being old as well. Being old is the time when life can appear as a picture, as a story - as a book which can be shared with someone, can be „sold” to someone. What can we learn from the elderly people? How can we learn to become the elderly? How can the young generation (of immigrants mostly) learn from the older one? How does culture matter the ageing process?

The paper consists of a few parts. I present the approach of understanding the process of ageing, the elderly, migration and the assumption of three models of learning: learning to get old, learning by being old and learning while being old. In the next part of the paper I present the

¹ The paper is a part of the project “Landscapes of life – in biographies and portraits of Polish seniors – immigrants to Sweden” which has been carried out thanks to cooperation and fundamental financial support of Embassy of Republic of Poland in Stockholm and University of Wrocław. The aim of the project was to present diversity of pictures of Polish senior immigrants to Sweden and indicate the importance of the generation of Polish senior immigrants for building the Polish community, where traditions and values of Polish culture are kept and celebrated. The artistic portraits of narrators by Bogusław Rawiński presented at the Seminar combined with exhibition were not only illustration of the research. The long life experiences could be readable in the features of the portraits. Photography is not only a capture of the moment, a reminder of the past, but it presents the ephemeral of glance, smile, gesture – something special and particular, and this is what the photos illustrate.
idea, the methodological background (biographical theory) and some results of the project carried out in Sweden.

**Keywords:** elderly, learning to get old, learning by being old and learning while being old migration, life histories, learning, signposts of life.

1. **The meaning of being old**

   The old age is a stigma. As my pre-research shows the fear of being old is so strong that the issue of old age does not occur neither in daily conversations, nor in public ones. Young people do not think about ageing or that one day they will become old as well as people over 60 they do not want to be named as the elderly. Ageing has been considered a social taboo. Public awareness that elderly people belong to discriminated groups is so much limited in Poland, at least. Very few realize that discrimination due to age is only a matter of time, since aging is inscribed in biological plan of development. We might fight against being labeled old, but one day either we stick it to ourselves or someone else will do this to us.

   As Blaikie (1999) points out the imagery of the Third Age encourages to develop a new kind of retirement lifestyle in which the emphasis has shifted from issues of sickness and decline towards health, liberation and more active aging. Those presumption gives more space and light for the research of the Third Age.

   Aging is a collective process which we experience individually. There are a few theories of aging but one of them, the activity theory of aging can explain approximately my way of understanding the process of ageing. Activity theory says that people construct ideas about themselves from two major sources: the things that they do and the roles that they fill in life. According to activity theory people give up many roles as they age—they retire from work, become widows or widowers, drop out of professional and other organizations, leave clubs and unions, and so on (http://www.medrounds.org/encyclopedia-of-aging/2005/12/activity-theory.html). These changes challenge the ideas that people hold about themselves. The changes may create a reduced sense of identity as well, and they sap the strength of one's inner "self." For this reason people need to, and most actually do, engage in activities that develop substitute roles for those that have been abandoned. Hence, activities in later life are essential to restore one's "self" and boost one's sense of well-being. "Activity theory sees later life as a time of potential individual growth and renewed social relationships – life satisfaction derives from social interaction and active participation so the post-work period can be a positive, creative and busy time" (Withnall, 2003). The activity theory makes the following certain assumptions:

   - there is an abrupt beginning of old age;
   - the process of aging leaves people alone and cut-off.;
   - people should be encouraged to remain active and develop friends of their age;
- standards and expectations of middle age should be projected to older age;
- aging people should be encouraged to develop and be involved.

Although, the influence of activity theory of ageing on learning/educational perspective of ageing is important. As Walker (1998) claims activity theory may open the door for educators of adults to develop suitable interventions and legitimate their claims to be able to offer older people choice and opportunity for keeping their brains active and healthy. Moreover, activity theory may be far too limited to capture the complexity of older people engagement in social activities and their participation in education (Withnall, 2003).

2. Being old as a challenge for education

Learning of the obvious and simple dependence that exists from the beginning till the end of life. And taking care of life is one developmental task. Life can be divided simply into three clear periods: childhood, youth and old age. I argue that in every period of life we should keep in mind that our body is getting old, what means that we should learn to get old. Therefore I present the idea, the outline of three models of learning: learning to get old, learning by being old and learning while being old as well what is my normative frame of my research. I will argue that life histories of elderly people are important part of learning to get old and accordingly might be useful for the young generation to create and reflect on their life experience and prepare to be elderly. Is it possible to prepare young people not to be afraid of getting old? How can we learn to become old? In my opinion one of the possible ways is education - lifelong learning. Learning to get old, learning by being old and learning while being old. These three models of learning are normative and developing ones. They should not be analyzed separately but should infiltrate each other. The project of the models is an attempt to compile and establish the potential of learning which is spread in everyday life and to indicate the possibilities of educational activities of getting old, by being old and while being old.

Learning to get old

Adulthood is a continuum process of becoming an adult, is a redefinition of our being in the world, our relations with the others, and redefinition of our identity. The world is not "our private world" we are like an actors on the stage, life is like theatre (Goffman) and we can create our existence in the world, we can create our micro-worlds in the macro-world. Therefore we can learn to be old. When we are young most of the time we do not think and we do not care about our health, our body. We do not exercise our body and mind. Quite often we do not eat healthy and proper food. We forget that we are mortal and we are born, we get old and we die. We should remember that everything what we do when we are young will bring consequences in later
life. How much do we work?, what do we do at work? How do we spend our free time? Do we have hobbies? And how much time do we spend for our pleasure?

There are cultures, societies, where elderly people are noticeable in the political, economical, educational and social level. Where elderly people are visible in the public places (fitness clubs, cinemas, theatres, restaurants, pubs), they go sightseeing and travel. Exchange of experiences with other countries and implication of good practices, solutions are important for developing education about elderly (learning to get old learning by being old and learning while being old). Therefore international education should be one of the main tasks of learning to get old.

**Learning by being old**

Showing diversity of pictures of the elderly and exposure to the elderly in public space is one of the ways to learn to get old by being old. One of the places where we can learn to get old by being old is popular culture. Media, popular culture – film, music, commercials these are fields which appear in our everyday experiences. Pop culture is not anymore only entertainment but has become a field where symbols and meanings are created. More often the heroes of popular culture become the models, the life guides. The existence of popular culture in every human being's life penetrates everyday life and embodies the elements of “tacit knowledge” Illeris, 2006 za: Polanyi). However, the texts of popular culture mostly are “open texts” - don't have the “internal meanings” which need to be given by the recipients. That is why they need some intellectual activity, they need critical reflection.

The other field where we can learn to get old by being old are public places where elderly people are most of the time transparent or even invisible. In Poland we cannot see so many elderly people in the cinema, in the theatre, in the pub, on the concerts. If they are there, they are treated more like problematic objects than equal partners for discussion, they are “the others”. In my opinion we need inclusive education, intergeneration education, learning abilities to co-exist, co-create the common sphere. As Tapio Aittola (1998, s.107) said “Learning is an elementary part of everyday life world, and its practical activities and all spheres of everyday life and action situations should be regarded and studied as meaningful learning environments”.

**Learning while being old**

One of the characteristics of the elderly is “a big baggage” of experiences. On one hand experiences can be useful in learning new things, but on the other hand they can become obstacles in learning. When the “thoughts frames”, the meaningshames are inflexible, formed during all life and difficult to change, learning while being old can be more complicated. “Learning in later life may consist of the kind of reflection and life review which take place in an unstructured and spasmodic way but which may lead to greater self-understanding and individual
insight” (Withnall, 2003, p. 295). One of the theories which can be useful to recognize, to understand and to analyze learning while being old is Transformative Theory of Jack Mezirow.

3. The context of migration

Migration has a long history. People have been moving, changing places, culture for ages. Migration is a complex problem which needs to be analysed and researched from different perspectives: educational, political, social, cultural and economical. Today most countries include immigrants of different nationalities whose life histories are interest for researchers of sociology or education. There is statistics about immigrants in different countries – numbers of immigrants, numbers of diversity of gender, age and nationality - but that data is often most useful for political, legal or economical research. There is lack of qualitative research done on migration from an educational perspective. Migration of course has a lot of faces and can be analyzed from different educational perspective as well. Many Poles have immig rated to Sweden. They had to migrate because of the political, economical reasons or they might have moved because of their wishes. There are as many reasons for migration as many immigrants. There are good and weak sides of every migration. There are many faces of immigrants’ world. The world of Polish immigrants to Sweden is multifaced, as well. It needs to be researched, as I assumed. One of the immigrants’ world is the world of Polish senior immigrants to Sweden. Their world seems to be quite different from the world of Polish immigrants who came to Sweden a few years ago or those who came as children.

An immigrant’s life is not what it is like but as it is told. While living in another country we experience immigration individually but stereotypes and prejudices are mostly learnt in the group. By listening to life histories of people who have been living abroad for many years, we can hear not only the patchwork of incredible experiences but we can learn about ourselves, about the others, about another culture, customs, superstitions and stereotypes. Therefore I use the biographical theory in my research.

4. The biographical theory as a frame of the research

The biographical theory is precisely related to the learning. “Through learning both poles: a structured frame that direct our life and spontaneous attributes that we impute to ourselves, combine together” (Bron 2006, p. 18-19). The learning process changes perspectives and possibilities and this way becomes transformative (Bron 2006). Analysis of our biography gives knowledge necessary to change ourselves depending on constantly changing life situation. Biographical learning takes place in social structures and cultural contexts of interpretation.” Alheit (2002, p.65). Therefore it is important by analyzing a learning process at an individual level, to reach also to external structures, objective facts that create a course of life (Alheit 2002).
Biographical narratives reveal how the continuity of "being oneself" is created. It is an opportunity to get an insight into the narrator’s past experience and critically reflect on it. It is possible to reconstruct the past from the perspective of the present. Things or events get different meanings in the course of events or as they happen (at the earlier stages of adulthood: early adulthood, middle age) from the meanings which are given to them in a narrative talk from the perspective of time, distance and the experience of other events.

Each life is situated in particular, limited period of time and therefore beside biological, social curve of life, there is also an individual curve containing the whole life. With big probability we can discover in biographies of people living in particular periods of time some facts related to external events and to accepted social norms. "People’s life consists of temporary, transient and absolutely ended at some point periods of different quality" (Giza 1991, p.123). Peter Alheit (2002) indicates that everybody has a unique biographical plan which is revealed while analyzing narrative biographies. Awareness of responsibility for our life can help us to deal with life crisis but on the other hand it may lead to crisis, which is indeed hard to avoid. The crisis not only influences our subjectivity but also depends on life structures (Bron 2006).

Agnieszka Bron (2006, p.19) holds that “biographical learning consist of experience, knowledge, reflection, self-reflection and of all the lessons that follow experience enclosed in our life stories. It is self-consciousness that helps us to learn from our biographies through summarizing, reflection, self-reflection and through telling stories to others or to ourselves”. Biography can be generally described as “gathering and organizing the experience within the history of life; institutionally and socially specialized areas of experience become more integrated and setting down they shape a new structure full of meanings – this state is considered to be called biography” (Alheit 2002, p.64-65).

As Agnieszka Bron (2006, p.19) writes “the biographical theory provides an interesting explanation on biographical activity as a result of interaction between different environments which at the same time are the product of biographical activity”. Social groups that a person interacts with on everyday basis have an important meaning for biographical plan. It only confirms that biographical learning is situated in social and cultural context as well. It means that if we want to recognize and analyze the biographical learning we have to know the biographies of different people. Thus the best way of getting in-depth view of peoples’ lives about their way of thinking, interaction with others, believes, way of learning, coping with problems, new situations is to listen to their narratives.

A narrative is the form of biographical representation. A narrative output is never an isolated product. There is always a close link between a narrative and other social, cultural, ideological contexts (Rokuszewska-Pawelek 2002). A story and experience described in it by the narrator will only make sense if there is good understanding of the broader contexts where the story and experience are imbedded (Denzin 1989). Therefore, it is not without a reason that I employ the biographical method. Consequently, I gathered the life histories.
5. The outline of collecting and analyzing the life histories

The aim of the project is to draw a map of the microcosms of learning of Polish senior immigrants to Sweden. According to symbolic interactionism I wanted to approach subjects who were as much different as possible. In particular, I interviewed people of different professional and educational backgrounds – both gender groups (men and women), different religions (Jews, Catholics), Polish elderly immigrants to Sweden. Those who came to Sweden around 30 years ago. Thus, they know both Swedish and Polish culture. To find such cases I used the snow-ball technique which allows a researcher to find a case one by one using the first one as an “opener”, introducing person to the next cases. The search for the new case was ceased by data saturation. Therefore, after the 10th interview I felt that the material which I got is large and rich enough to carry on the analyse. My narrators have authorized their written life histories. Thus I might come back to them. It means, that I do not close the project, but on the contrary I keep it open.

There are different traditions in doing qualitative analysis of data among researchers. The researchers who use the qualitative methods are creative and flexible in the way of analysis. The right method of analysis does not exist. Nevertheless, I have chosen to do analysis of my collected data which follows the model established by Strauss and Barney G. Glaser called the grounded theory analysis (Glaser, 1992, 1998). There are some steps of analysis which should be done to be proper. There are open coding, selective coding, discovery and naming categories (Glaser, 1992). I am just at the beginning of the analysis. I have done the first step of it - open coding and I was astonished by the knowledge I got. It will take time to do open coding once again and selective coding. Nevertheless what I can present are “signposts of life” which popped up from all ten gathered narrations.

6. Signposts of life

Every Narrator mentioned something crucial for him/her, something what is a kind of conclusion of their lives, something what they learnt through their long life experiences, something what they want to share with the others, something what I named the “signposts of life”. The “signposts of life” are subjective. However, the interpretation, reflection is open and embodies many meanings. I present the “signposts of life” of my Narrators with my short interpretation, what I learnt from them and what might be valuable for the three models of learning presented above.

Signposts of life – the meaning of life

Life is an adventure. (Andrzej, man, 73)

Life is a journey... you must love your life and permanently discover something new. (Dana, woman, 66)
An adventure is something what happened or will happen unexpectedly. Something what we are waiting for. The mystery of an adventure is unknown. An adventure is exciting and inspiring action in us. It gives power and brings new possibilities. When we treat life as adventure we allow life to flow. We follow the sings? which life brings. We are open for the new and take advantage of possibilities surrounding us.

While travelling we might be lost or drop the needless luggage. There are a lot of ways of travelling. We might travel alone, in pair or in the group. We might travel on foot, by car, by bike, by train, by airplane and what is important the view from each one is different. We are responsible for choosing the way of travelling. The same is with life. We decide where, when, how we go, travel. It is up to us what way of life we chose. Do we accept what we got or we fight against. Possibly, as Dana said, when we love ourselves and our life we discover the beauty and the bright sides of life.

**Signposts of life – how to live**

*Life without work - absolutely not, work is needed.* (Janusz, man, 66)

*To be active permanently ..... not to be bored, to have interests.* (Maria, woman, 64)

*Everyone should do just what he wants.* (Michał, man, 65)

*Decisions emerge from longing.* (woman, 81 age, Klementyna)

When we experience some difficulties, when we are at the “dead point” of our life, when we are paralyzed, we do not notice any possibilities to solve the problem which we got. Then we are seeking for the recipe how to live. It seems that my Narrators, as we can read above, have found the recipes how to live. They are subjective ones. Nevertheless there might be the clue which we can take under consideration. One of the Narrators, Janusz, suggests to fill the life with work. Another one, Maria recommends to fill it with activities, hobbies. Michał makes a point that the best way of life is to follow our needs. Where we are, what we do, most of the time come from our decisions, which we make some time consciously and another time being unaware. As Klemantyna claims decision emerge from longing.

**Signposts of life – what is the key of life?**

*Emotional commitment is crucial, everything else is unimportant.* (Zosia, woman, 65)

*Dreams are absolutely essential.* (Zbyszek, man, 69)

The hierarchy of essential values of life has been constructed through all long life. The importance of value has changed what explains the theory of gerotranscendence by Lars Tornstan (2005). According to the empirically based theory (Tornstan, 2005) the individual moving towards may experience a series of changes and developments, which include a
redefinition of the self and relationship to others and new understanding of fundamental existential questions. Life experiences and ageing process carry some critical self-reflection. That brings us knowledge and learning what is crucial. As my Narrator Zosia claims, the fundamental in life might be emotional commitment (in different dimensions) or dreams, as Zbyszek points. Love and dreams which might come true keep us alive.

“Signposts of life” – the place in the world

_Everyone needs to be treated as an individual._ (Janina, woman, 75)

_The world is so interesting, but very complicated and difficult to cover._ (Janka, woman, 92)

There is a big diversity of people in the world. Everyone has his/her own place in the world. Talking to people, listening to them I have realized that it is quite common to generalize about people of different nationalities, gender, religions, abnormal (in our opinion) look or appearance. The stigmatization is a process which exists in everyday life (Goffman). We forget that everyone is different and needs to be treated as an individual, as Janina emphasises. While long life living we gain different kind of experiences, we learn from travelling, migration, reading, watching movies, own everyday life experiences. While being young we see life in front of us and the complexity of the world appears partly. Thus coming closer to the end of life “with a big bag of experiences” we might get the wide point of view of the world. As Janka, 92 years old argued, _the world is so interesting, but very complicated and difficult to cover._

Talking about our life, experiences, conveys our feeling, opinions, thoughts about ourselves, the others and about the world. The signpost of life are not only the clue that we might learn from but in some way describe the Narrators, as well. The chosen signpost are meaningful, complex what means that might be interpreted and understood in many “right” ways. Thus, referring to the three models of learning: learning to get old, learning by being old and learning while being old they might be helpful for all of them.

**Conclusion**

The world, as we know it, that we experience is given to us independently not as a system of individual unique objects but the world full of meanings, symbols and purposes. It is subject to constant changes. A person who lives in such a world discovers and explores it through his or her activities, experiences and interactions with others. “The represents of cognitive, interpretative, hermeneutic currents presume that the social world is an intersubjective structure which is continuously created by the exchange of sense and meaning in the course of social interaction” (Malewski 1997, p.30). A human is not surrounded by “bare” objects. Neither does s/he deal with “naked” facts. S/he faces the challenge of meaningful objects and events (Jakubowski 1998). The complex and multi-faceted surrounding social world manifests and objectifies itself in culture. In order to understand a part of the surrounding world subjected to a
study, to understand the experience and experiences of the people one meets in this world, one should get to the sources of experience and fit it into the structures of the meanings and sense applied by the individuals who take part in the research. Having assumed that the objective world available to humans to experience it (Malewski 1998, p.29), the world where we live, is full of sense and meanings it would be necessary to think of a way how to "get" to them and understand them.

There are many ways to understand and research the world. The life history as a method is flexible which means that there is a dialogue between a researcher and the informant. They can both learn the unexpected and expected as well and the situation of learning "is determined not by the researcher, but by the informant’s view of his or her own life" (Thomson, 1981,p. 294). There are many benefits of that method but the one, pointed above, is the main one why I have chosen life history as the qualitative research approach.

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Why study English at the Senior University?

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Abstract

In an ageing world, our societies are, and will increasingly be in the near future, made up of greater numbers of older citizens, as presented by the United Nations prospective figures (2010). What do these citizens do once they retire? What are the challenges that they face? How do they live? How do they occupy their time after being released from the work force group? These and many other questions are now becoming the foci of research projects.

The senior citizens of our societies have specific interests that are different from the interests from all the other age groups. Many senior citizens are enrolling in Senior Universities, institutions that according to Graça Pinto (2003) result mainly from the ageing of societies and the need for senior citizens to adapt to new lifestyles after retiring. These institutions, however, differ from the regular educational ones, particularly in their lack of evaluation or certification, which according to the author may result from the unwillingness of the senior citizens. It seems clear that these senior citizens wish to be students after they retire, but with very particular interests.

Learning or improving foreign languages is not an easy a choice at any age. Nonetheless, according to Graça Pinto (2003), Foreign Languages are generally offered by Senior Universities. So why do senior citizens choose to study English, for example, at a Senior University? What do the students aim to learn? What are the senior students’ greatest difficulties in learning English? These are some of the questions that a small case-study survey aims to answer. The data gathered has allowed for a greater understanding on the motivation of students to join a Senior University.

The collected data allows the comparison between these students’ reasons for studying a foreign language with the reasons presented by the teenage and young adult students that participated in Gallagher-Brett’s study Seven Hundred Reasons for Studying Languages. The students’ self evaluation of learning progress and accomplishment tries to determine which competences, according to the Common European Framework of Reference for Languages, are more important.
for students in order to potentiate improvement in future courses, particularly in the English course.

This presentation intends to be not only a report of the data gathered by the questionnaires, but to go beyond that in presenting a teaching and learning experience that has proven to be extremely enriching for the students as well as for the teacher.

**Keywords**: ageing, senior citizenship, Senior University, foreign language study, English study by seniors

*Age is an issue of mind over matter. If you don't mind, it doesn't matter.*

Mark Twain

**Introduction**

Participating in the Second Conference of ESREA on *Elderly, Education, Intergenerational Relationships and Social Development*, is truly an enriching opportunity, one that will allow for the sharing of expertise and also of experiences that will bind all of the people who are concerned with these issues. More than merely stating and discussing research data, which nonetheless will be discussed later on, this presentation aims to portray the example of an experience that has profoundly marked a teaching and learning situation, something that was unexpected to probably all of its participants. More than demonstrating the data collected from a student questionnaire on English studying at a Senior University (SU), this presentation will focus the personal and professional development that this experience has potentiated in all its participants.

This presentation will start with a description of the teacher’s professional development since graduation as a language teacher, one that may help understand some of the arguments that will be presented later on. After this, a contextualization on the development and organization of the English classes at the Senior University will be presented in order to clarify what has already been happening. Data obtained from a questionnaire filled-in by a sample of the students will be presented next; this questionnaire was used to question the students on issues concerning: the reasons that motivated them to enrol at a Senior University and to study English; what the students’ main interests are; what students think about the contents and evaluation; and also the students’ degree of satisfaction towards the University, the class and its contents. Final considerations of the results and personal considerations from the experience, that may offer suggestion for similar experiences in the future, will be closing the presentation.
1. Professional development

After graduating as a Portuguese and English teacher, as so many other colleagues, I was faced with the reality of a teaching career in the current set of affairs in the Portuguese Educational System. Not to say that I was expecting it to be easy, in fact it was always very much present how difficult it is nowadays to have a teaching place in a school, but when faced with the possibility of not being able to teach at all, I had to make a decision on the age level I was willing to teach.

I started teaching elementary school English knowing from the start that it would not be an ideal situation for me. From the start I was aware of how little I knew of the elementary school teaching reality, having been prepared to teach at the Junior High school, High school and Secondary levels. Reality was even harder than expected and forced me to invest considerable amounts of time in reading about it and also cooperating with the teachers from this teaching level in order to learn from their experience. Secondly, the necessary differences in teaching methodologies were challenging and I was lucky to have the help and support of great teaching materials and other more experienced colleagues who shared important information on activities and class management with me. I taught one entire school year and by the end of it I became fully aware that this experience changed my teaching style in many ways. The specific context of elementary school English was the first approach that I had to a teaching more focused on learning than on evaluation and results. Not that this level of English is not conducted seriously, but the strong emphasis on game and songs became something that I decided I had to incorporate more in the future, no matter the age group I were to teach.

I went abroad, as part of my PhD research project, and spent one year studying and working in Japan, a reality that is different from the Portuguese one in everything, especially in what concerns education. While there, simultaneously to my studies, I worked as an English teacher in a private language school. I started another unique teaching experience there: teaching adults. My students in Japan were graduated adults, from several different areas of business, highly motivated to study English – particularly for professional purposes – and who had one-on-one classes with focus on oral competence. This experience, due to the hard-working students, the commitment of the language school to excellence, the great teaching materials available and especially the level of contents studied was a teaching experience that was not only enriching, but that fully showed me why I had wanted to become a language teacher in the first place.

On coming back to Portugal, and facing a short period of professional indecision, I was asked by a friend whether I would like to volunteer as an English teacher at a Senior University that was about to open in Gafanha da Nazaré, where I live. I had heard about senior universities but had never heard that teachers worked as volunteers, this was the first surprise. However, remembering how much I enjoyed working with adults in Japan I became curious about this new experience, teaching another age-group of people, and so I accepted. This was the beginning of a teaching journey that changed my life, as a teacher, but above all as a person.
2. Senior University and English classes

The United Nations prospective figures (2010) clearly demonstrate that our societies are, and will increasingly be in the near future, made up of greater numbers of older citizens. In agreement, as presented in the “Handbook Language Course Teaching Methods for Senior Citizens” developed by the Lifelong Learning Program of the European Union, it is stated that: “The European population is ageing: over the next 30 years the number of younger Europeans (up to 24 years) will fall by 15%. One in three Europeans will be over 60 years old, and about one in ten will be over 80” (2006, p.4). Graça Pinto (2003, p.469) defends that in consequence of this ageing of societies Senior Universities (SU) are being created in order to respond to the specific needs and interests of senior citizens, that are feeling a need to adapt to new lifestyles after retirement. These educational institutions differ from the regular educational ones, particularly in their lack of evaluation or certification, which according to the author may result from the unwillingness of the senior citizens themselves (2003, p.472). It seems clear that these senior citizens wish to be students after they retire, but with a specific set of rights and duties.

The Prior Sardo’s Foundation Senior University in Gafanha da Nazaré (near Aveiro), started in the school year of 2009/2010. Classes follow the regular school year calendar of the national educational system, in three trimesters of classes and three periods of holiday, during Christmas, Easter and the summer. The course options covered from the beginning a number of areas including Languages, Information and Computer Technologies (ICT) and a variety of arts and manual work, areas that Graça Pinto (2003, p.472) and also Pereira (2005, p.48) describe as common to this type of institution. A course on the traditions and history of the home town was also offered from the start. In what concerned the offer in language, the students could enrol in Portuguese Language, divided into reading and writing, English and also French. Learning or improving foreign languages is not an easy choice at any age, nonetheless, according to Pereira, Pinto and also the program for Lifelong Learning, Foreign Languages are generally offered by Senior Universities, even if the “...specific needs of language teaching senior citizens have not been sufficiently taken into account by language trainers, teachers and generally education providers” (2006, p.4). As for the teachers, the Prior Sardo’s Foundation Senior University follows the example of the English style of Senior University that according to Pereira (2005, p.47) is characterised by being more informal than the French model, that closes the gap between students and teachers, where students play a more significant role in management and where teachers are usually volunteers and the teaching offer is more focused in social and recreational aspects. Pinto also describes this model of Senior Universities in Portugal as following the model described. According to both authors, the teachers are mostly volunteers, many of whom are retired teachers that wish to continue to teach the subjects they had taught all their professional lives, and some teach and study simultaneously. A minority of the teachers are young, recently graduated teachers, and there are cases of courses where the person teaching has no teaching degree. Some of the teachers were hired, which is also in agreement with Pinto’s description of the
teachers working in Senior Universities (2003, p. 472), and work simultaneously for other municipal programs for senior citizens.

Taking into consideration the informal context expected by the institution, from the beginning, I decided not to impose on the students a rigid curriculum that was too demanding linguistically, but instead I decided to explore issues of intercultural interaction and sociolinguistic and intercultural openness in my classes. This was presented and debated with the students from the start and received their approval. It always seemed evident to me that senior citizens would have a clearer idea of what they wished to learn as opposed to younger learners, since they already carry in themselves valuable experiences learnt throughout life. Joel May has developed a series of tips for teaching senior citizens where he emphasises the importance of this life-experience by stating that “In planning instructional sessions, it is beneficial to build on the rich experiential base that the students bring to the learning situation” (n.d., p.5). This perspective is also shared by Rodrigues Jr. (2006) who defends that teachers cannot overlook the amount of experiences and knowledge the senior students bring to classes. Data presented by the Lifelong Learning project also defends that “Biographical reflection is therefore an important component of language course teaching methods for senior citizens” (2005, p.34). It was following this didactic suggestion intuitively that led me to question all the students in the beginning of the school year about their reasons for choosing the English class and to ask them to describe what they wish to learn during that year. Not surprisingly to me, most of them at this time refer how important it is for them the opportunity to travel and communicate with people in English, which is in accordance to Gallagher-Brett’s study in which languages “…were associated with[…] communication and mobility…” (2004, p. 2). Intuition, pedagogical concern and curiosity from my part and from my student’s were the keys that led us to develop, a teaching curriculum that particularly focused oral competences and the study of lexical knowledge related to travelling.

We are now beginning the third year of this Senior University and consequently the third year of these English classes. During the first two years the English classes maintained their oral focus and as well as another of May’s tips “a multi-media approach to provide variety and stimulation in the classroom” (n.d., p. 6), including paper supports, audio-visual PowerPoint presentations, audio recordings and videos. The lifelong learning project’s data also shows that “…language courses for senior citizens […] should offer a wide range of methods, instruments and tools to promote the storage as well as the recalling of learning contents” (2006, p.40). Most classes include the study of a topic, usually related to travelling, or basic aspects of the language (started with the study of numbers, colours, jobs and such). Most classes also contain a dialogue routine or sample that is adapted by the students according to their knowledge of the language and pair or group practice. At the end of the class the students have a musical moment in which they listen to a song, suggested by the students or by the teacher, the students receive the lyrics of the song and then discuss what main ideas they can understand from it. Students have demonstrated that this activity involving the songs, from both classic and modern genres, is one
of their favourite parts of the English classes and if in a class we do not have this moment students eagerly ask me about it. Every holiday and important day in English cultures is mentioned and discussed, either by a teacher presentation or by student presentations. Social celebrations involving the whole class and decorations of the senior university installations are usual by the time of Halloween, Christmas and Easter. At the end of the year party of the senior university the English class rehearses a song to sing with the help of audio support. Role-play is another activity that is recurrent in the class, but usually students adapt the situations to their personal context and develop their own dialogues to perform to the class.

Teaching senior students has been a constant challenge in which all that I teach is constantly questioned by the students. The motivation they bring to class is like the one of no other age-group of students but nonetheless the amount of work they do after class is usually lower, which consequently makes their learning process a slower one. I have to constantly be searching for new materials to present to them, as well as to adapt all the materials I already possess, but that only makes the classes even more enriching for all of us.

It is a fact that age brings a series of limitations both physical and cognitive, these are well documented through medical studies and also in the data presented in the “Handbook Language Course Teaching Methods for Senior Citizens” from the Lifelong Learning project. For some students, it is difficult to accept their age-related limitations, others force themselves to overcome such difficulties. In the beginning, after teaching young and teenage learners, I used to produce materials that soon proved to be less appropriate for my students. The fonts used where too small, some of the videos had too little colour and were hard to distinguish, audio was too low, in conclusion they were not appropriate for my students. Also overlooking the fact that memory “…declines as part of normal ageing…” (Lifelong Learning, 2006, p.40), I didn’t repeat nor revised enough times so that all students could fully grasp each set of contents. Despite the little available research and teaching guidance that still exists, I found a way of coping with the inadequacy of my teaching methodologies and tools: the students. They presented to me all their suggestions and whenever a material or resource is causing trouble they let me know and even suggest how changes can be made. I now understand their limitations better and therefore design classes and materials according to that knowledge. One of the most surprising things that I have seen students overcome through classes was health issues. Senior citizens are also known to live with more health problems, and my students are no exception they do have some health problems, but as time goes by in school years I have noticed that generally they demonstrate more vigour, act livelier and miss less classes on account of health problems. This makes me a firm believer on the gerontological studies that “… have identified education as one of the most important factors of stabilising health.” (Lifelong Learning, 2006, p.4).

In teaching conferences presentations tend to focus problems and difficulties felt by the students, by the teachers or both, it seems that focusing on what is wrong is more relevant to study. I believe that when something is not good one should always reflect upon it and study it in order to improve, but the decision of presenting this senior English class experience in this
conference followed the opposite assumption. This experience has been very enriching for me as a person and more importantly as a teacher, and as for my students I notice that they continue to believe in being part of this journey, no matter how demanding it may be. That being said, this presentation chooses to present what is already good, what is already functioning well.

3. Students’ questionnaire

By the end of the 2010/2011 academic year I gave an online questionnaire to a sample of the students. A particular aspect of this English class, that distinguishes it from other age-groups’ classes, is that the number of students in my classes varies constantly. Given that the frequency of classes is voluntary and that there is no formal evaluation, students are free to attend the classes whenever they want to. Most of them are present in all the classes, but some are not. Some students abandon the classes within term duration and there have been cases of students initiating the classes in the final term only. This flexibility poses some challenges in the lesson planning but ultimately does not affect the classes too much. From the total number of the students in this academic year, about 25, eight students chosen randomly filled in the questionnaire. The questionnaire aimed to answer the following questions about studying English in a senior university: What are the reasons that motivate senior students to join a senior university? Why do they choose to study English? What level of English knowledge do the students possess? How satisfied are the students with the classes’ contents? What would the students like to study more in the English classes? How much time do students dedicate to studying English outside of the classes? And finally, would the students like to be evaluated in their classes?

For most of the questions asked the students’ responses are in agreement to the available theory. The students’ age ranges on average between 55 and 70 years old and the number of female students is slightly higher than male students. Most of the students have studied in the Senior University since it started in 2009 and also started English classes in the same year. The reasons the students present to enrol in a senior university are mainly to do with enhancing knowledge, particularly in areas such as languages and the ICT as well as the occupation of free time in the company of people with similar interests. All these reasons are also mentioned by May when describing the goals of senior students where he highlights the goal “To learn and satisfy curiosity” (n.d., p.2). Graça Pinto also emphasises the fact that senior universities are places for students to keep active and intellectually active (2003, p.473). Moreover, when asked about their reasons to specifically study English students highlighted the universal importance of the language as well as its crucial role in enabling communication with people around the globe, particularly during travelling. These reasons to study English as a Foreign Language are in agreement with Gallagher-Brett’s study on the Seven Hundred Reasons for Studying Languages, where the author concluded that “Languages were associated with enjoyment; personal benefits such as employability, communication and mobility; an appreciation of culture and enhanced relationships (both personal and political)” (2004, p.2). One of the students highlighted a strong desire to learn both English and ICT, a reason for study that is in
agreement to what the Lifelong Learning Project states to be the motivation source in senior students of languages since “...living far from the IT language – mostly English – means living far from global community. And for senior citizens [...] IT-language ignorance is a primal point of social exclusion” (2006, p.22).

When asked about previous knowledge of English, roughly half of the students stated they had previously studied English, most of them having studied it for a period between 1 and 3 years, either during their regular studies in the national education system or in private language schools. The data collected from the sample of students that answered the questionnaire is in agreement with what students presented about their English studies in their introductions in the beginning of the school year.

Concerning the degree of satisfaction the students feel about the English classes 6 out of 7 answered with very satisfied and 1 answered satisfied. Students’ efforts to continue to study English even when progress is slow and the environment of openness and humour we achieve in class even during discussion of controversial topics lead me to the belief that these students are generally satisfied with the classes, but the factor I believe contributes the most for this degree of satisfaction is that they are part of every decision-making, be it in the choice of content and its organization or in the listening of their opinion on current matters in society. This again shares May’s opinion that senior students “Are able to contribute much to a lesson when their varied life-experiences are incorporated into the instructional planning” (n.d., p.5).

Based on some of the communicative competences presented in the Common European Framework of Reference for Languages, students were also asked their degree of satisfaction concerning the study of grammatical, lexical, historical and cultural knowledge, as well as knowledge on intercultural interaction and socialization studied in the English classes. Students’ answers demonstrated they were generally satisfied or very satisfied except in what concerned the grammatical knowledge in which one student stated to be indifferent. Explicitly grammatical activities are not very frequent in these classes, even though grammatical content is always present. Students are not expected to conjugate verbs, or directly formulate the grammatical rules for the passive voice, but nonetheless such content is presented and studied through texts and the analysis of song lyrics. The degree of satisfaction concerning the socialization in class 5 students stated to be very satisfied and 2 stated to be satisfied, since it is always a goal of my classes to promote good relations among the students so that we can all share a fulfilling experience. The importance of socialization is particularly relevant in teaching senior citizens and for that reason May advises teachers to “Allow for interaction, warmth, and friendships to develop in the learning situation” (n.d., p.6). When asked about which of the above mentioned knowledge areas students would like future English classes to focus more the majority of the answers was lexical knowledge and socialization.

The Portuguese law clearly states (DL nº252/82 of 28th of June) that Senior Universities may be called “University” so long as they agree not to give any kind of certificate or formal academic degree to their students. The informal aspect of the institutions and the lack of formal
evaluation is therefore reinforced by legal means that prevent these institutions from recognising
the students’ academic achievements. Nonetheless, Graça Pinto raised an interesting question in
her work concerning the lack of evaluation in senior universities also due to the unwillingness of
the students to be evaluated. She argued that senior students would let her know that after a
lifetime of evaluation and assessment they no longer wished to continue to be it. This strongly
contrasts with the advice given by May in which he advocates: “Provide some form of evaluation
in order to establish the extent to which the primary goal and specific objectives have been met”
(n.d., p.6), which nevertheless does not imply a formal evaluation with marks and scores. In the
questionnaire I asked the students whether senior universities should subject their students to
formal evaluation, only one student responded yes. When asked specifically on being evaluated in
English classes two students answered they would like to be. Based on the answers collected
through this questionnaire and after students debate this in class, I am considering adding
diagnostic tests on the contents studied at least once a term in this year’s classes. I believe such
tests, without being subjected to formal marking, but instead being corrected collectively in class,
may help students self-evaluate their progress which may increase their motivation in the study of
the language.

The questionnaire ended by asking the students whether they intended to continue the
study of English in the present academic year to which only one student answered negatively.
The students’ willingness to continue to be a part of these classes is overwhelming and I recall
the sadness of one student who contacted me on my mobile, in his struggling English, only to
apologise for not being able to be present in the classes for family reasons.

Final considerations

In the future and for all of those teachers that are unaware of the experience of teaching
senior students I hope the experience I have described in this presentation is an incentive and
helps them in a task that can be overwhelmingly satisfying. It is not easy to be constantly
challenged and questioned in your teachings, since this is hardly the case with teenage students
who tend to be quite passive or indifferent to their studies, but the constant effort to improve and
adapt to promote knowledge is rewarding. When interacting with all my students, but in particular
with my senior students, I never forget that I am in the presence of people who already possess
valuable knowledge, probably on subjects and areas that I know very little about. For that reason
I try to learn from my students all that I can, listening to their stories, to the experiences they are
willing to share and above all respecting all their opinions, no matter how different they may be
from the ones I share.

If I had to highlight anything from this experience, I would have to refer the consideration
of the students and their sense of responsibility despite the informality of this educational context
which never stops to amaze me. This has truly been an incredible experience for me and I am
sure, for they have told me, for all my students, who will always be the living proof of why I
decided to become a teacher. When I talk to my students and listen to their interesting points of view on current affairs and various other issues I forget I am talking to people who are old enough to be my grandparents. My students never stop amazing me with their young spirits and ability to accept a reality that greatly differs from the one they knew early on in their lives. This new and progressive way of thinking and seeing the world that all these students demonstrate allows me to agree with the authors of the Lifelong Learning project when stating that “…learning promotes the understanding among the generations and reduces the social generational gap” (2006, p.4). Certainly I try my best to widen the students’ horizons, in the way of understanding reality and so forth, but they also improve my understanding on issues that I am too young to fully grasp (for example the social exclusion they sometimes experience). We learn from each other and for that I am ever so thankful to them for the impact they keep on making in my teaching and in my life.

*We don't stop playing because we grow old; we grow old because we stop playing.*
George Bernard Shaw

**References**


Lifelong learning, intergenerational relationships and ICT: perceptions of children and older adults

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Abstract
Ageing population is one of the topics that have attracted the attention of several countries in the interest of social cohesion, economic growth and financial sustainability.

Promoting active ageing population is one of the strategies adopted by different countries to avoid early retirement and to encourage older workers to remain longer in the labour market, to remain healthy, active and independent, as long as possible. Active ageing requires the involvement of older adults in a increasingly global, technological and digital contemporary society. This participation presents challenges for education and lifelong learning, especially to older people who did not acquire digital skills during their previous education and training. This is a group that, as a consequence, might suffer from a high risk of exclusion of the benefits of the Information and Knowledge Society.

Active ageing, generational relations, coexistence and solidarity between generations are topics on the developed countries agenda. Therefore, active ageing and intergenerational solidarity are two complementary subjects in favour of a common challenge, in which education and learning play an important role.

This paper seeks to find out and to understand how children and older adults think of lifelong learning and generational solidarity, particularly through organised training activities with the use of Information and Communications Technology (ICT). For data collection in this process we will conduct informal conversational interviews with younger and older participants as well as observation of the way the activities develop. The analysis and data interpretation will allow us to get relevant inferences to understand their interests and perspectives on ICT skills, digital literacy
and digital inclusion in society. The conclusions will be crucial not only to develop strategies to encourage useful and significant learning, but also to investigate new opportunities for understanding education and intergenerational lifelong learning, supported by ICT in general and the Web 2.0 in particular. Then, we will make our contribution to the promotion of active ageing, solidarity and intergenerational relations, trying to collaborate in building a better future for all generations.

**Keywords:** lifelong learning, education and learning of older adults, intergenerational relationships, active ageing, information and communication technologies.

**Introduction**

From the second half of the 20th century, ageing European population, has become more pronounced due to declining rates of fertility and mortality, representing a demographic shift in many European countries with socio-economic and health care implications.

The latest projections from Eurostat (Europop2010) for the period 2010-2060, indicate that the population of the EU27 will continue to age, it is expected that the population aged 65 years or older will increase from 17% in 2010 to 30% in 2060, and the population aged 80 years or more increase from 5% to 12% in the same period. For Portugal, the projections indicate a significant increase in the population over 65 years, from 17.9% in 2010 to 32.0% in 2060, and with over 80 years, 4.5 and 13.5% in 2010 % in 2060 (Eurostat, 2011a).

Consequently, the ratio of older people in EU27, i.e. the population aged 65 years and older divided by the population aged 15 to 64, is projected to increase from 26% in 2010 to 53% in 2060. In Portugal, this ratio increases of 26.7% in 2010 to 57.2% in 2060 (Eurostat, 2011b).

These indicators represent challenges and opportunities for the development of European society, especially in terms of economic growth and financial sustainability.

To promote healthy ageing and active population in the interests of social cohesion and greater productivity is one of the strategies adopted by the European Union, through the Action Plan on "Ageing Well in the Information Society" (COM, 2007) under the "i2010 - a European Information Society for growth and employment" (COM, 2005) to halt the trend towards early retirement and encourage elders to stay in the job market staying healthy, active and independent for longer.

In the perspective of the World Health Organisation (WHO, 2002) the concept of active ageing is understood as “the process of optimising opportunities for health, participation and security in order to enhance quality of life as people age. Active ageing applies to both individuals and groups. It allows people to realise their potential for physical, social, and mental well-being throughout their lives and to participate in society according to their needs, desires, and
capacities, while providing them with adequate protection, security and care when they require assistance.”

Active ageing denotes the participation of older people in contemporary society, increasingly global, technological and digital. For this participation to be real and effective is necessary to involve older people in opportunities for lifelong learning and e-inclusion to bridge the digital divide and make e-Inclusion a reality. The European i2010 initiative on e-Inclusion “To be part of the information society” expresses the idea of “ICT solutions for active ageing”. Despite these initiatives, older people do not often use ICT tools in general and computer usage skills in older age groups is low. According to Eurostat, in 2007, 81% of respondents in the age group 65-74 and 60% in the group 55-65 said that they have no computer skills. In the group of 55-74 years old, highly educated respondents used computers more and felt more skilled (75%) than older people with low education (19%).

In an increasing digital and technological society, learning throughout life is principal for the elderly to continue to participate in community social life, economic, cultural and civic, and not only physically and psychologically healthy. The European Commission communication “Making a European Area of Lifelong Learning a Reality” identifies strategies and measures for fostering lifelong learning for all (European Commission, 2011). Adult learning communications “Adult learning: It is never too late to learn” (European Commission, 2006) and "Action Plan on Adult learning" (European Commission, 2007) emphasize the importance of an efficient adult education system in lifelong learning concentrating on the quality of learning approaches for adult learners, recognition of non-formal and informal learning, investments in the education of older people and migrants.

According to European Civil Society Platform on Lifelong Learning, lifelong learning covers education and training across all ages and in all areas of life, be it formal, non-formal or informal. It shall enable citizen’s emancipation and full participation in society in its civic, social and economic dimensions. Its objective should not only be described in terms of employability or economic growth but also as a framework for personal development (EUCIS-LLL, 2010).

Lifelong learning can be seen as an answer to the problems of older people, providing opportunities to develop new skills, particularly in areas such as ICT, and opportunities of intergenerational sharing of experiences and knowledge. Learning can enrich quality of life for older people, and also for the people interacting with, and learning from, them. Older people have a lot of valuable in-depth knowledge to give to younger workers and to each other, and new technologies can provide new means for enabling this. Intergenerational learning provides a context that can improve both learning the specific learning topics and the tacit knowledge and life experiences relating to them. In this way, the learning situation also enriches the general understanding between generations (Ala-Mutka, Malanowski, Punie, & Cabrera, 2008). Intergenerational learning may provide many types of positive effects, as studies have shown that young people who learn with older people have more positive and realistic attitudes to the older generation (WHO, 2002).
Speculating that through the use of new technologies, we may find out and understand how children and older adults can experience lifelong learning and generational solidarity, particularly. We conducted informal conversational interviews with younger and older participants as well as activities observation in the context of ICT workshops of the tin@ project, a Project on Information Technology for Grandparents and Grandchildren, in Bragança, in the northeast of Portugal.

1. Description

The tin@ project is an initiative of the School of Education - Polytechnic Institute of Bragança, particularly the Department of Educational Technology and Information Management, and aims to promote the link among grandparents and grandchildren through ICT, the coexistence between generations and family cohesion.

This project began in 2010 with two workshops. Given that this pilot experiment, involving two groups of grandparents and grandchildren of Bragança and Mogadouro, beat initial expectations, the project decided to promote more workshops in the city of Bragança in 2011. Contacts were made with different social agents involved directly or indirectly with children and the elderly, potentially interested in participate in this project. The Social Centre Santos Mártires joined the project again, supporting the dissemination to users of the Social Centre and to the general community and helping in the process of registration of participants and context analysis. Three ICT workshops were organized for July (one for grandparents, other for grandchildren, and another for intergenerational) and a basic ICT general program was defined.

The first workshop in ICT, targeted at grandparents and adults over 50 years, was held 18-25 July, from 2:30 p.m. to 4:00 p.m., at the School of Education. The second workshop directed at children and grandchildren from 6 to 12 years took place in the School of Education, 25-29 July from 10:00 a.m. to 12:00 p.m. The intergenerational workshop was held 20-29 July, from 8:30 p.m. to 10:00 p.m., in local premises of Nogueira parish.

These workshops provide the basic ICT skills and use of Web tools for communication/interaction, including the following contents: ICT, word processing, electronic presentations, Internet and e-mail, Web security and Web 2.0 tools. From this general program, the contents were changed and adapted to the characteristics, interests, needs and abilities of students. In these workshops, and at participants’ request, they can also make the examination of basic ICT skills to obtain the Diploma of Basic Skills in ICT (DCB).

After knowing the students, identify their level of digital literacy and understand where their interests and needs in ICT, we began training with a brief and clear presentation of ICT and the Digital Society, referring to the advantages and benefits to the active ageing, lifelong learning and intergenerational relations. Thus, we now present the contents and activities in each of the training workshops.
In the workshop for grandparents/older adults contents focused on general concepts of ICT, use of word processing (insert and format text, images and tables), electronic mail (creating an email, send and receive messages), Internet (general concepts, navigation and information research). The activities focused on oriented utilization of resources and software, exercises, using Google Maps and operation of the iPhone.

The workshop directed at children turned around notions of ICT, drawing programs and word processing, electronic mail, Internet and Web security activities were based on the holding group and individual exercises in computer programs, with particular emphasis for the creation of "gifts to the grandparents' day" with using ICT, examples of which are letters, poems, drawings and electronic postcards. The theme of Web security has stimulated the children by conducting educational games. In this workshop, three children approved out the examination of basic ICT skills and have obtained the DCB.

In the exploration of the intergenerational education content was made through the theme "Arts Atelier", as this group meets once a week to learn various artistic techniques. ICT, word processing and electronic presentations, the contents were selected to perform word processing documents, the materials and procedures to be followed in conducting the workshops, and creating electronic presentations with photos of the work produced. The e-mail and Internet integrated activities only in the last two sessions, once the workplace did not have Internet connection and had to move the students to the Social Centre (16 km). Although the students have recognized the advantages of email, no one has created a personal account because they do not have Internet access at home. Navigation and Web searching focused on finding information about the community, arts and crafts, photo view and video.

At the end of the workshops the students expressed satisfaction and interest in participating again in intergenerational learning activities with ICT.

2. Methodology

Informal conversational interviews and observation were the methods used for data collection. These research methods are qualitative and intended to explore interesting topics for research and gain a holistic understanding of the interviewee. This type of interview resembles a chat, during which the informants may sometimes forget that they are being interviewed. Most of the questions asked will flow from the immediate context. Informal conversational interviews are useful for exploring interesting topics for investigation and are typical of ‘on-going’ participant observation fieldwork (Berry, 1999). Kvale (Kvale, 1996) defines qualitative research interviews as "attempts to understand the world from the subjects' point of view, to uncover the meaning of peoples' experiences, to uncover their lived world prior to scientific explanations."

The interviews took place in the first session for each workshop. During the presentation of students, the teacher/interviewer was talking and asking questions to students about their
behaviours, opinions, values, feelings, knowledge and background characteristics. In this relaxed and informal atmosphere, students felt free to express themselves and engage in the group.

The observation during the activities enabled the assessment of actual behaviours and attitudes of students concerning the use of ICT to lifelong learning and generational interaction.

3. Results

**Informal conversational interviews**

In the workshop for grandparents/older adults’ eight persons participated, two residents in urban and six in rural areas. Through the personal data we found that female participants are in the majority (7). The age group is between 64 to 77 years, the average age being 70.5 years. All participants are retired, and the professions who played were: home (4), immigrant (2), businessmen (1) and teacher (1). The predominant qualifications were primary education, except for a grandmother who had a degree. When asked about ICT, we found that none of the adults have ICT skills and only one has personal computer with Internet connection at home. Also the use of mobile devices (mobile phones and the iPhone’s) is reduced (4 elderly) and limited (making and receiving calls). Nevertheless, 75% showed interest and need to acquire ICT skills to communicate and interact with family and friends, as well as a more active and critical in the digital society. Lifelong learning, intergenerational solidarity and other issues were discussed in interviews. Socialize, share, learn, discover and know, were some of the words that the group used to refer the objective in attending this workshop, highlighting the importance of harmony between generations, solidarity and mutual learning, which can be rediscovered and sustained through new technologies.

The workshop for grandchildren/children received eight participants, three males and five females. The average age of children was 9 years, ranging between 6 to 12 years. All children were students, 75% attended the primary education and 25% studied in the secondary education. Most children lived in the district of Bragança and two lived in Lisbon. In relation to ICT, we found that all the children had used a computer (mainly to play), but only three children (the oldest) had basic ICT skills, e-mail address and profile on social networks. They were also children who had personal computer in their homes with Internet access and used more than four times per week, either to play, see multimedia content, communicate with friends/family, and to do school homework and research. Regarding the intergenerational relationships, children appreciate and respect older people, especially grandparents. Consider them as digital excluded but willing to help grandparents and other seniors how to learn and use new technology in order to spend more quality time with them.

The intergenerational workshop is characterized by a diversity of ages (4 to 63 years) and female predominance (79%). Fourteen learners participated in this workshop, 9 adults and 5
children/youth. The children were students and adults were still in active, whose occupations were farmer, auxiliary operations, bank, hairdresser, businessman, household, trainee and assistant. The educational skills of children were: pre-school (20%), primary education (40%) and secondary education (40%). Adults had the following qualifications: primary education (45%), secondary education (33%) and higher education (22%). Asked about digital literacy, all students know how to use a computer and access the Internet, though the majority had basic skills and on average used ICT once or twice a week. Two students and three adults used e-mail and social networks. Personal computer and Internet connection were available in half the homes of students. Although this group is fairly young (average 36.3 years), older people do not feel the need to make use of ICT in their day-to-day, mainly for lack of time and interest. However, they emphasize the importance of lifelong learning, relationships and generational solidarity, and were receptive to update and acquire new digital skills with the help of the youngers, according to their interests, needs and availability.

**Observation**

During the training workshops we found that the elderly and older adults felt some averseness in using the computer because it was considered old to learn ICT and for fear of damaging the equipment. Situation that has been successfully overcome in the following sections as the elderly and older adults felt more comfortable with the computer and identified positive and useful to their personal and family life. We found some limitations of accessibility for this group in particular some troubles to view information in the screen and the level of skills in handling the mouse and keyboard. Other difficulties were linked to cognitive limitations of the age, such as lack of concentration, attention, memory and mental exhaustion. Some people said they felt some difficulty in remembering instructions and actions to work with some programs, and that computers could be designed with them in mind in order to better adapt to their physical limitations. Another factor pointed out by the students was that they wanted access to personal computer and Internet connection in their homes. However, these difficulties have been removed during the lessons or by the motivation and curiosity of students and by the encouragement of grandchildren/children, other learners and teacher for the use of ICT.

About children, we confirm that they were distracted very easily, ably to use the computer and have very basic ICT skills. However, if integrated in joint activities with the elderly they become more responsible, helpful and guiding in tasks.

An interesting aspect is social and emotional relationship that developed between some learners, provided by the learning and intergenerational solidarity.
Conclusions

The dynamics of these workshops provided to the elderly demystification of technological complexity, empathy with the digital devices, the acquisition of basic ICT skills and appreciation of lifelong learning as an opportunity for active aging and generational living.

The older adults are a very heterogeneous group, not only because they fit into different age categories (50-64, 65-74, 75+), different stages of life (working/retiring and living independently/dependently), but also by other factors that influence their view and quality of life (financial, social, family, literacy and personal interests). We found that these aspects affect the way older people think of lifelong learning, interests and needs of ICT.

Therefore, knowledge and understanding of these limitations of individual elderly is essential to plan correct methodologies, strategies and activities that are important and significant for lifelong learning.

Although this was a short study limited to a small group of participants, these informal learning initiatives provided the increase of the use of ICT by the elderly and promoted intergenerational sharing of experiences, also supporting in giving new meaning to the lives of older people as we can demonstrate elderly participants’ satisfaction, enhanced pride and autonomy.

Bibliography


Will I still study ... "When I'm Sixty-Four"?
University experiences of mature students:
challenges and obstacles

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Abstract
In 2006, the introduction of the Bologna Process in Portuguese Universities brought significant changes in the academic world, opening new doors to adult students in order to (re) join (again) in Higher Education. Returning's to school has become, a difficult task due to a number of obstacles and difficulties that exist in the academic career (eg, reconciling family and professional lives, the understanding of specific programs contents, etc.).

In this article we intend to explore the academic experiences of mature students when they decide to enter in Higher Education. What are main motivations and barriers during the academic career? What are the relationships established between teachers and other traditional students? What are the expectations for the future?

Keywords: adult, motivation, higher education, bologna process, mature students.
Introduction

In Portugal, the implementation of the Bologna process, through the law 64/2006 of March 21st, allowed a bigger and easier way into Higher Education (HE). With this new law a new way of accessing HE was created, allowing the entrance of candidates older than 23 (M23), or 23 in December 31st are allowed to apply to HE trough to the realization of some written tests. This special application is divided in several steps:

i. the appreciation of the candidate;

ii. a written test of knowledge, according to the chosen degree and

iii. an interview such a selection process has different characteristics from the “traditional” one – grades from secondary school and national examinations.

The analysis of the vitae curriculum allows valuing the personal trajectory and life experience of the candidate, acquired in formal and non-formal contexts. In the written tests, the candidates must show some evidence of knowledge about several pragmatic contents according to the intended degree. After the result of the written tests, the candidates are submitted to a personal interview, with the purpose of accessing and evaluate the main reasons and motivations to enter HE – and in that specific degree.

In the University of Algarve, the access to higher education by M23 has been experiencing an increase since the beginning of the implementation of Bologna Process. In 2006, they were only around 80 students and in 2010 they were already around 150 students.

The process doesn’t consider age, welcomes all candidates with more than 23 years, which allows individuals with older ages, far beyond from the traditional contingent, being accepted at HE. This breaks, undoubtedly, with the traditional model of the student type. It’s however, a sign of the times. The aging of the population had, inevitably, to end up changing a few myths, for example, what gives an age for the performance of some activities such as studying and learning. It also illustrates the value of primacy of experimental learning in contexts that usually didn’t consider it.

For authors like Rocha (2007), “the aging population, shouldn’t be viewed as a crisis, since the elderly contribute significantly to the healthy development of their families and communities” (pp.17-18). The current situation suggest, that the issues of adulthood needs a “new look”, meaning, it shouldn’t be seen as a problem but as an opportunity, which is realized both in the acquisition through older people, new skills, such as the refinement of others, previously acquired (Bynner, 2001).

There are several reasons for the re(entry) in higher education by this population: advance their careers; change jobs; turn an old wish to reality or just find an alternative meaning to their lives. This paper is part of a broader project focusing on non-traditional students conducted by two universities in Portugal (Algarve and Aveiro) and mainly focuses on identifying
In this paper we intend to find answers about the main reasons why adult students, in an older age (over 30), to pally higher education, what are the difficulties experienced during the academic career, how they describe the adaptation process compared to a new context and also the relationship they established with the remaining traditional students. Using a qualitative methodology, based on the analysis of biographical reports (Dominicé, 1990, quoted in Pineau, 1995), and of interviews with “older” students, we aim to access their motivations and expectations, gather their opinions about the academic course, identify their experienced difficulties, gains and possible changes.

1. Theoretical Framework

1.1. Definition of term “adult”

The term “adult” comes from Latin, Adolesc, whose etymological meaning refers to the last condition after adolescence. Thus, the concept of adult is defined as “a condition, the end of the growth, but there’s no consensus about the exact age from which the adult, also called adulthood begins” (Barros, 2011, p.43).

For many authors, the age, maturity, experience and autonomy seem to be determinants and characteristic of adulthood (Rogers, 2002). Erikson, outlines a trajectory to adulthood that is marked by several phases and stages that we summarize in three basic steps: a) the period of young adult, limited between 18 and 35 years old, whose primary concern is to create its own identify; b) the period of “medium” adulthood, determined by goals, dreams and plans related to career and family life and the period of maturity, the retirement age, or period of life when individuals have more time to devote to their well-being (eg. Caring of grandchildren), and or, “to try new psychological and social dynamics” (Erikson, s/d quoted in Lucio-Villegas, 2005).

Others theorists have been looking into the definition of the term “adult”, in particular the vital period of the cycle that marks the passage from adolescence to adulthood. This period corresponds to a new stage of life, which reaches a certain status and social role, due to a set of social changes that affects family life, professional and financial (Prager,1993 quoted in Ferreira-Alves & Gonçalves, 2001, p.80)

1.2. Education and learning

Education can be defined as “the action exercised by adult generations on generations that aren’t yet ready for social life, tries to raise and develop in the child, a certain number of physical phases, intellectual and moral, claimed by the political society and particularly by the
mean to where the child is intended” (Durkheim, 1922, quoted in Pires et al., 1991, p.25). It’s a classic definition, clearly dated, and that reports an understanding of the concept of education as an exchange of values and knowledge’s between mature generations and younger generations, from which is expected to do the same in the future. It’s also a definition that reduces the opportunities for education and learning to a certain period of life, childhood, appearing to reject that the learning process continues through all life.

The conceptions of learning opportunities in adulthood have in fact, recorded very significant changes. In the early 20th human development was represented by “rungs of age” (Épinal, quoted in Vandenplas-Holder, 2000), it is believed that among the 51-60 was reached the maximum of progress ability. The subsequent stages of life were arranged in a downward direction, and are classified, respectively, a decline age (61-70), expires age (71-80), age of decrepitude (81-90) and age of imbecility or of childhood (91-100).

It was a very simplistic view, which considered the development in terms of growth and decline, in nowadays, is strongly challenged (Tennant, 2000). Recent studies show that although there are continuous processes and discontinuous of action, whose beginning, middle and end are located at variable times, no period of life has a primary importance; growth and decline don’t follow a line (Baltes, 1999; Damásio, 2011). The development is dependent on contextual variables, characterized by the multidimensional and multidirectional, and these processes are determined by the joint action of different and interactive factors (Cavanaugh & Blanchard-Fields, 2006; Csikszentmihaly; 2008).

This current conception, which puts into question the question the idea of common sense that correlates inversely the increase of age with the ability to acquire new skills and knowledge, reorganizes the learning opportunities and the development even ate older ages, and also puts several questions, such as, for example, the right to education of mature adults.

Considering the current increase in life expectancy and the extending of retirement age, aspects like learning at older ages, professional development and intergenerational relations in a professional context, problematize the role of lifelong education in the adaptation of the elderly.

In a more current and embracing way, the educational process is synonymous of “commitment” a kind of contract that lasts from the time of birth to death. This kind of alliance crosses a set of several generations, from our grandparents (family of origin) to the new generations of children and grandchildren (2nd and 3rd generations). Regardless to the environment to which it belongs, generation, class or social status, it reports us to a socio-cultural dimension of social life. Whether in the family or professional area, or even in leisure, relationships between individuals must be reflected by a particular socio-historical context.
1.3. Sources and motivation of lifelong learning

The sources and motivations for learning can be determined by several factors, both extrinsic and intrinsic. Extrinsic factors are external to the subject and refer to context(s) in which it appears, how it’s understood and is influenced by him. The intrinsic factors are related to the internal characteristics of the individual, (for example, school records, meaning, the previous academic preparation, academic satisfaction, among others. (Gilly (1986), quoted in Câmara Municipal de Faro, 2006, p.12)

Sutcliffe (1998) argues that learning becomes more effective and motivating when there’s a particular context or purpose. Give as an example “to pass a driving test, get a particular job or even pass an examination” (p.72). The author mentions five sorts of learning, which differ according to our personal goals; i) in a working environment; ii) in leisure; iii) for the independence; iv) in social relations context; v) for personal development.

One characteristic that highlight this new wave of young adults it’s the list of uncertainty and concerns about theirs professional future. The need to learn more, acquire new tools, new valences, has become an essential in the curricula of individual lives. Is privileged more and more, new skills such as teamwork, knowledge of languages, the ability to solve problems, among other personal characteristics. Thus, and as explained by Sutcliffe (1998), when the learning is done, focused and dedicated to work contexts, allows the individual to build confidence and self-esteem in the place where is his occupation.

Learning in a context of leisure plays an important role in the development of skills related to the application of spare time. In this context, outlines activities like outdoor walks, workshops, and training sessions on various topics related to sports, culture, crafts, among others.

The experiences that occur in changing situations provide learning processes with a view to independence (for example: transition periods correspond often, to a stage in which mature students (re) enter to University; be autonomous).

Social relationships are, undoubtedly, a source of learning. Although the learning processes are present in every life moments, they are undeniably activated in (and by) the intensification of social life. This learning process is also a great contribute to ours social interactions (e.g. family, friends or classmates among others).

Finally, Sutcliffe (1998) refers to another source of learning, which aims the personal development. Says that personal development in learning may include creative arts, subjects in order to have fun, or the fulfillment of individual and personal goals, for example, photography, painting, ceramics, among others. It is, therefore, a private domain of choice, and which results from personal choices that people makes on issues or areas that interest them.
1.4. Work and family

Working life is a central line, one of the most present and important aspects in adulthood. Embodied in the first instance, the subsistence of the individual promotes self-esteem and expands the range of opportunities for personal, social, formative and professional development. It's during this period and through the performance of a profession/career that we feel useful, valid and recognized. Despite the gain achieved (personal, material and knowledge that we acquire) is also in this period that we lose many other things.

The working life has also characteristics, and productivity requirements as well as competitiveness, which overlap the know-how, experience and skills acquired in and to work. However, the knowledge acquired and accumulated over the years is also synonymous of age. This is a heavy factor for most people, mainly from a certain age (55 years). Age is certainly one of the most conspicuous forms of discrimination and exclusion, not only on employment but also in general society.

The family as privileged place “of the social construction of reality from events and relationships that appear more natural” (Saraceno, 1997, p.12), has also changed its dimensions. It became organized differently living according to new values and new roles, suffering rapid changes in several social aspects. On the other hand, longer career and the transformation of values and morals, interfere, in the family sphere.

2. Method

2.1. Biographical interviews

In the present study was used a variant of semi-directive interview. The interview, as a qualitative methodology, captures the subjectivity of the actors, while allowing them to express in their own words and not by a predetermined set of responses. The truth is that each story is unique and special. The interviewer, being a privileged element, assume himself as a true “guide” that accesses to each chapter of life, told in first hand, a unique opportunity to enjoy life episodes marked between discontent or emotions, frustrations and achievements, scenarios that only the interviewer has the opportunity to enjoy (Pérez Serrano, 1994). We wanted to know the main motivations, which lead older adults (over 30) to join higher education and how they live this academic experience, which can mean an exciting challenge, as it seems like an awkward and intimidating experiences.

There were made seven biographical, interviews to M23 students from the University of Algarve (from 3 different Campus) - three female and four males, aged between 24 and 54 years, being one of them unemployed. Each interview lasted on overage one hour and they occurred inside the University buildings and, in two cases, near student’s houses – in a public area.
In our analysis, here, we will focus on the following dimensions:

- Reasons for applications (entry) and it’s difficulties;
- Mode of conciliation between the familiar, professional and academic spheres;
- Academic Experience (as they relate with other students, how they manage their own learning process and their difficulties).

3. Mature students profile

Reasons for application (entry) and its difficulties

The entrance to higher education in undoubtedly one of the most memorable moments in the academic life of many students. The way as this new stage is seen isn’t always perceived and lived in the same way. For some is a new challenge, for others the fear on failure and anguish of the unknown can become a real obstacles.

For our interviewers, the main reason to apply for higher education includes the need to advance their careers and the consequent possibility of increased salary.

“Yes we are reclassified. Currently, I’m an administrative technical assistant and if I’m reclassified I became a Superior technical. Doubles the salary, it makes much difference.” (Woman 39, Office of Administration – night work).

Under the current situation regarding to employment, having higher qualifications contributes to a repositioning of the work functions in the hierarchy and hence to an increased salary. The opportunity to achieve a higher level of training, often sealed in the “right time”, now seems to want to be taken, being the most reported source of motivation by the individuals to join in higher education, by this way of M23.

One other set of reasons for the application is also mentioned. It’s about the acquisition of new tools, techniques and conceptual knowledge, that M23 recognizes may be by the frequency of university courses.

“The learning level, the acquiring of a set of tools that are useful, of course, I learned, which is interesting. Acquired certain tools and learned, and I can use them, for example, ate the work I’m doing now.” (Male, 34 years, Artistic and Cultural studies).

“After almost twenty years working in local development, to know it all backwards, all the rural life problems, I realized I had a lack in Theoretical basis. It was also a bit why I chose Social Education.” (Man, 51, School of Social Education).
In this last testimony we should emphasize the distinction he makes between the practical and the theoretical knowledge and the consciousness to complement them. Although usually the world of work can be used as a context for applying of the knowledge acquired in previously formations, in these case the reverse seems to have succeeded. The subject already had the experience, said he knew “back to front all the rural areas problems”, which seems to have been the main reason for seeking a different kind of knowledge. We believe that he wasn’t expecting that the knowledge he had about his territory action was questioned but rather consolidated, and eventually validated with the theoretical contributions that are provided with the training he attends.

The possibility of personal development is also part of the reasons that led them to apply to HE. As noted above, the reasons aren’t always objective, with an immediate purpose, leading adults with responsibilities and family and/or professional commitments, to apply for HE. One other aspect mentioned relates with possible consequences in adults lives when enter HE, but they value, a personal desire of appreciation.

“Knowledge (...) was trough my husband (...) it’s was impossible for him, so he asked me if I wanted to (...) I always enjoyed studying (...) and as I’m not working (...) I decided to went.” (Woman, 48, School of Civil Engineering).

“(...) it isn’t a monetary issue, I don’t have may perspectives related to that issue (...) So I’m already in the first year. Work, we’ll see.” (Man, 36, Sociology)

Finally, and as difficulties found for admission, we highlight a single indicator that emerged in the analysis corpus: the appreciation of personal and professional experience. It’s as we have seen, a selection of criteria, and consists in the analysis of the curriculum vitae of the candidates and appreciation through and interview, of their experience and motivation.

“I really think it was the interview (...) in fact, one of the problems (what’s an handicap for the young M23), is that an individual without curriculum, is crewed (...) my curriculum, and the one from the guy who has behind me, was a little bigger than the one who stayed in front of me, was decisive (...) the professional profile was enough for access.” (Man, 54, School of Tourism).

The validation of life experience hasn’t been a selection criterion for admission into HE. Starting to be so, in the application process for the M23, it’s understood and accepted by candidates who recognize the validity of this criterion.
Work and family

Today’s society is more and more demanding relatively to these areas and, independently of gender, work and family are linked in the individuals lives. This situation is against to the previous model career (previous contemporary society), and it was based on the assumption that man was the “head of household” and that woman was a “home fairy”. The problems between family and professional life were almost non-existent or ignored, since marriage and birth of children, were regarded as essential for personal responsibility and stability of a professional. Nowadays, and as family and work are two interdependent spheres, so that we can achieve affective performance in both, it takes time, energy and involvement of the individuals.

References in this category, work and family, are characterized, in a first level of analysis, because they had been given exclusively by female subjects. The established indications point to two types of references: those that emphasize the need for enforcement and sharing of home tasks, and those that refer the spirit of sacrifice that has to exist to reconcile personal (and family) with the recent life academic.

About the need to share tasks,

“My husband has always been a helper (...) when I joined school, my dilemma was: to iron the clothes, three people with a child, and he helped me, helped me a lot (...) he said: the smaller pieces you iron them; pants, shirts, sheets, these bigger things, let’s make a deal with a laundry. (...) He handled with the laundry he goes shopping, to the butcher, to the market, and so he took care of the groceries.” (Woman, 39, Advisory Administration – night work).

About the spirit of sacrifice that has to exist to reconcile personal (and family) with the recent academic life

“At the end of the week I have everything to do at home. I have the clothes of my children, who come home every Friday night with bags of clothes, and I have to take care of it (...) Sunday night, I have to have their bags made. They’re studying in Faro, and I can’t sacrifice them to take care of their clothes while they have to study and this is their time to study, not mine.” (Woman, 45, Management – night work).

These words represent the spirit of sacrifice that is associated to this new experience, and which translates into acceptance of a burden of home tasks that have to be made, even if it’s at the end of the week. But, more significantly, is the acceptance of this sacrifice by women. Refuses the right to be spared only because returned to school, giving the children who are also attending the HE, that exclusive privilege. In fact, and despite having taken the decision to
continue studies, she understands that she’s “out of time” and therefore doesn’t accept certain rights which, as stated, are associated to this condition.

The continuous preoccupation with the family and children, and the denial that can lighten responsibilities in this area,

“(…) I have my family; I also to separate things because my son is small, also needs attention.” (Woman, 39, Advisory Administration – night work)

**Academic experiences**

Regarding to academic experience there’s a set of characteristics traits that allows to characterize the adult student and that differentiates it from other students who applied to higher education in normal walk. They are: the relationship they establish with their classmates, intrinsic motivation and the definition of personal goals, and also problems that are distinct from those that are experienced by regular students. From the acceptance point of view, and according to reports obtained, students M23 don’t feel discriminated by their colleagues.

“No, never! Nobody ever put me aside, even stopped talking to me as talking to other girls. And this happens for all issues. I’m a normal fellow. There’s no discrimination or distinction. Nothing. I’m a normal fellow.” (woman, 45, Management – night work).

About the academic tasks, in general, in group works, ends up growing affinities between the older students within the class, and prefer to work with each other’s.

“In group works I prefer to stay with the older ones (…) since the first year, we stand together, the oldest three.” (Man, 54, School of Tourism).

This preference may be explained by some difficulties in identifying with the way of being and work of younger students.

“(…) I am a person who feels comfortable with any social class, any age group (…) I say that with age, I lost the shame, all lost already. But, quite honestly, there are times, if there are little bits in the talks (with the younger) that are interesting, there are others that it’s just teenagers conversations, and don’t say anything to me anymore (…) the enthusiasm that they sometimes have with a situation or another, to me (…) I’ve been through it. At the time, if only I had that age, would be super wonderful.” (Woman, 48, Civil Engineering).
Although there’s an instruction manual on arrival at the University to ensure academic success, it’s agreed that the performance of certain tasks and the acquisition of some work tasks can contribute to a good use during the academic route. We refer to the attendance, attention in class, the performance of tasks, etc... the non-traditional students are, per excellence, self-motivated beings, organized and can set their own goals.

One of the typical traits of the subjects in the study is their commitment and determination to complete successfully, this journey. Although each one has a rhythm and its own learning process, they identify rules and adopt procedures for this purpose. The following passages present rules, principles adopted, which, according to interviewees, contribute to the success of the academic career.

“(…) [what I learn] is more from what I listen in class. I go to school every day. I don’t miss classes.” (woman, 45, Management – night work)

“(…) I set myself the goal of fourteen! I said: - I have to finish my graduation with grade of fourteen! – and end up with fourteen”. (Woman, 39, Advisory Administration – night work)

“I left my body there, and today people say to me: “-How can you have a language with these grades?” If I liked I would exploded with the scale. But it’s like this. I’m in school, I’m not playing, and I thought: Since it has to be, I don’t like but I have to do it. I’m not young enough to be here playing. It’s such a difference among me and my colleagues. I’ve had their age (…) so is a different age, maturity is already different.” (Woman, 39, Advisory Administration – night work)

As we said earlier, the difficulties that M23 students experience are different from those students that apply in the usual way. One of which was marked by the subjects, is the lack of previous knowledge about the contents and the difficulty in integrating the concepts taught with the life experience, even when attending courses that focus on the area of professional performance. Although present high levels of motivation, the academic knowledge background is poor and they are consciousness of such:

“[The main difficulty] is to link that to my knowledge (...) and I’m not exactly an uneducated individual.” (Man, 54, School of Tourism)
Conclusions

We conclude that the professional area emerge as the priority that organizes the decision. About the adaptation process and strategies leading to academic achievement, it’s certain there are no magic formulas for academic success. However, the results of this investigation confirm that non-traditional students reveal a set of practices that are common to each other, and that makes all the difference over theirs academic careers: it’s not delaying their commitments, especially when their main goal is to complete a degree, the work is usually planned in advance and each task is achieved at the rhythm of each person. The ability to manage time is indeed a power that characterizes them. These students are rarely distracted by social events that aren’t related to the academic programs, for example, the week of the refresh man reception, the academic week, among others.

The old saying Stupid old man does not learn languages, seems to be getting further from the Portuguese reality, especially in nowadays, where you need to invest more in education. Regardless of social position, the social roles they play in daily life, the social class they belong to, sex, ethnic group, or even from their geographical origin, the non-traditional student is investing more and more in studies and shows greater responsibility, maturity and true commitment to complete its mission at the university.

In this way, it’s essential that the persons who contributed so much to the economy of its country, should be able to access jobs that give them pleasure but from which they can draw knowledge and, crucially, the opportunity to share what they have learned. Immersed in a wave of strong political and social instability, returning to school has become a major priority.

References


EU policy perspectives to active ageing

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“Adding years to people’s lives through the magic of science and medicine, however impressive, is an insufficient ambition for American Society. Our objective must be to add new life to those years.”

President John F. Kennedy, 1961 White House Conference on Aging

Abstract

The world is experiencing an important demographic transformation: the unprecedented ageing of the populations of almost all developed and developing countries. The growing presence of older people in society makes people of all ages more aware that they are living in a multi-generational society. Increasingly, ageing populations influence global patterns in labour markets, services and traditional social support systems like healthcare and pensions in European countries. The European Union has already taken various initiatives to promote active ageing. The elements for a comprehensive strategy to promote the employment of older workers have been defined, and are being monitored, within the European Employment Strategy and the EU 2020 Strategy. They include notably the improvement of working conditions and their adaptation to the health status and needs of older workers, better access to training and lifelong learning, better access to information and communication technologies (ICT) and the review of tax-benefit systems to ensure that there are sufficient rewards for working longer. Through the open method of coordination on social protection and social inclusion, the EU supports, monitors and assesses the implementation and impact of national reforms on retirement pensions and to ensure the long-term sustainability of pension systems. In order to gain political momentum for active ageing policies, a European Year for active ageing and solidarity between generations 2012 has been established and will provide an appropriate framework for action to be taken at local, regional, and national level as well as for transnational projects. The European Union widely recognised in its Europe 2020 strategy for smart, sustainable and inclusive growth the need to meet the
challenge of promoting a healthy and active ageing population to allow for social cohesion and higher productivity. Given Europe's demographic profile, adult learning, in its many forms – formal, non-formal and informal - has a major role to play in addressing the EU's economic and social challenges.

**Keywords:** EU policies, active ageing, older people learning, Grundtvig programme.

1. **Demographics**

The second half of the 20th century was a huge policy triumph for longer and healthier lives. We witnessed an unprecedented decline in mortality. In the middle of the twentieth century, under half of those born could expect to live to age 60. Currently, at the mortality rates of 2005-2010, three quarters of those born can expect to reach that age (73 per cent of males and 79 per cent of females). Women who reach age 60 can expect to live another 21 years, on average, and men another 18 years, given mortality levels of 2005-2010. In 1950-1955, the comparable figures were only 16 years for women and 14 years for men. In the European Union, there have been significant increases in life expectancy at birth since 1960 in all Member States. Official projections generally assume that gains in life expectancy at birth will slow down compared with historical trends as mortality rates at younger ages are already very low and future gains in life expectancy would require improvements in mortality rates at older ages. On the other hand, the wide range of life expectancies across EU Member States, and also compared with other countries, points to considerable scope for future gains. In some cases, improvements in education and standards of living have contributed to longer life expectancy, suggesting that it could be extended further in future.

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3. In 2006, life expectancy at birth for females ranges from 76.2 in Romania to 84.4 years in Spain and France, and for males ranging from 65.3 in Lithuania to over 78.8 in Cyprus and Sweden.
At the same time as the lifespan is increasing, fertility is decreasing. Fertility rates have declined sharply in the EU Member States since the post-war “baby boom” peak above 2.5 in the second half of the 1960s, to below the replacement level of 2.1. Although the 2010 European Commission Demography report\(^4\) registered a slow increase in fertility, most of the increase is in countries that have experienced extremely low fertility in the recent past, that is, fertility below 1.3 children per woman.

Population ageing is a long-term trend which began several decades ago in the EU-27. Ageing is visible in changes in the age structure of the EU population and is reflected by the growing proportion of older persons, while the proportion of those of working age in the total population declines. As the baby-boom generation retires, the EU's active population will start to shrink as from 2013/2014. The number of persons aged 60 and over has been increasing at an unprecedented rate. In 1980 there were 378 million people in the world aged 60 or above. 30 years later, that figure has doubled to 759 million, and it is projected to rise to 2 billion by 2050\(^5\). In Europe it is now increasing twice as fast as it did before 2007 – by about two million every year compared to one million previously. The combination of a smaller working population and a higher share of retired people places additional strains on welfare systems. Eurostat's population projections foresee that the ageing process will continue in future decades. On 1 January 2010, the young population (0-19 years old) accounted for 21.3 %, the population aged 20-64

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(considered to be the population of working age in line with the new Europe 2020 targets) for 61.3 % and the population aged 65 years or over for 17.4%. The median age of the EU-27 population was 40.9 years. This means that half the EU-27 population today is aged 40.9 years or over. In 2010, the old-age dependency ratio of the EU-27 was 28.4 %. This means that the EU-27 had around 3.5 persons of working age for every person aged 65 years or over. Between 1990 and 2010, the working-age population (20-64 years) in the EU-27 increased by 1.8 percentage points, while the older population (aged 65 or over) increased by 3.7 percentage points. These increases came at the expense of a decrease of 5.4% in the proportion of younger people (0-19 years).

According to Eurostat 2008-based population projections⁶, the EU-27’s population will be slightly larger by 2060, while the age structure of the population will be much older than it is now. The likely change in age structure is of more concern than the change in population size.

The median age is projected to rise to 47.9 years by 2060. The population of working age is expected to decline steadily. Older people would account for an increasing proportion of the population according to the same projections. The share of the population aged 65 or over is projected to increase from 17.4% in 2010 to 30.0 % in 2060. The proportion of those aged 80 or

⁶ Eurostat (www.ec.europa.eu/eurostat) produces population projections for each EU Member State every three years. These projections are what-if scenarios that aim to provide information about the likely future size and age structure of the population based on assumptions of future trends in fertility, life expectancy and migration.
over (‘oldest-old’) is growing faster than any other segment of the population, and is projected to almost treble by 2060. The old age dependency ratio (population aged 65 or over in relation to that aged 20-64) is projected to more than double from 28.4% in 2010 to 58.5% in 2060. The total age dependency ratio (calculated as the ratio of children and young people aged under 19 and older people aged 65 or over to the population aged 20-64) is expected to rise from 63.2% in 2010 to 95.5% in 2060. The implication is that there will be almost one person of working age for every dependent person aged under 19 or over 65 years in the EU-27.

What can be done? Mankind’s dream has always been to conquer ageing altogether. In the rich world, we can expect to live, on average, more than a quarter of a century longer than people did 100 years ago. Is that a blessing or a Struldbraggian curse? With the right policy response to the new, never before experienced phenomena, ageing does not represent a threat but a valuable historic achievement and opportunity.

2. Policy developments

Active ageing is defined by the World Health Organization (WHO) as the process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age. Active ageing allows people to realize their full potential for physical, social, and mental well-being throughout the life course and to participate in society, while providing them with adequate protection, security and care they needed. In the WHO definition “active” refers to continuing participation in social, economic, cultural, spiritual, and civic affairs, not just the ability to be physically active or to participate in the labour force. The concept of ‘active ageing’ has become essential to international and national ageing policy development, and implementation strategies and their subsequent progress.

The first plan of action on ageing, the Vienna International Plan of Action, was adopted by Member States in 1982 at the first World Assembly on Ageing. At that time, it was already apparent in developed countries that populations were ageing, while the issue remained on the distant horizon in most developing countries. The Vienna Plan of Action concentrated on two facets of population ageing – humanitarian (responding to the specific needs of older persons) and macro-economic or demographic (the implications of an ageing population for socio-economic policy) – with the latter focusing on general concepts meant to ensure that older persons did not become a drain on national resources. The following Madrid Plan of Action on Ageing moved from description to analysis and aimed at developing approach to population ageing, through the mainstreaming of older persons into international and national development plans and policies across all sectors as well as a life-course intergenerational approach to policy that stresses equity, reciprocity and inclusiveness of all age groups through all policy areas.

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A fundamental justification for mainstreaming has been defined by the Madrid plan by the fact that older persons may have different issues and needs from younger people. Policy makers should consider the needs, the activities, the resources, the benefits, and the participation of people of all ages. The Madrid plan stressed the need for research on ageing and collection of age disaggregated data in order to understand the issues of older persons, the diversity of situations among individual older persons, and the direct and indirect impacts of policies and programmes on older persons. At the same time it recognises that older people are not a homogenous group and that age impacts people differently depending on a number of factors (different priorities and goals; different legal and traditional rights; access to different levels and types of resources; different roles within the household; use of time differently). Moreover, situations, conditions, needs, priorities and goals of older persons will likely change throughout the period of “old age”.

**European Union: From challenge to opportunity**

The European Union seized the opportunity to ensure that prolonged lifespan is Europe's best potential and historic achievement and responded to the Madrid plan with the European Commission Communication of 18 March 2002 as part of the overall strategy of mutually reinforcing policies launched at the European Council meeting at Lisbon and confirmed at subsequent European Council meetings in Nice, Stockholm Gothenburg and Laeken. In its communication, the European Commission already advocated the need for changes in the present practices of age management in work places and labour markets while stressing the need for a shift towards maintaining the working capacity and employability of older workers, through measures such as training, health and safety measures, adjustments to workplace and job design, introduction of work facilitating technology, and new working time arrangements. Education from an early age to promote awareness of the multifaceted aspects of longevity has been stressed as an essential and cost effective measure to enhance healthy lifestyles and reduce disability in old age.

Instruments by which to drive back negative attitudes towards older workers have furthermore been secured through European legislation. In November 2000 the Council adopted a directive outlawing discrimination in employment including on the grounds of age as part of the Union’s right-based approach to these issues. Successive European Councils have recognised the need to tackle the effect of ageing populations on European social models. In October 2005, the Heads of State and of Government stressed at their Hampton Court informal summit that demographic ageing is one of the main challenges that the European Union will have to face in the years to come. The European

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10 Council Directive 2000/78/EC establishing a general framework for equal treatment in employment and occupation (27/11/00)
Commission responded to the concern raised at this Summit by its Communication "The demographic future of Europe — from challenge to opportunity"\(^{11}\). The Communication raised the problem of the regional and social implications of population ageing which will face difficulties in supplying essential public goods and services, such as health care, housing, urban planning or transport. The increase in the number of very old dependent persons also raises new problems of an economic, social or even ethical nature. The Communication pointed out pressures linked to the age-related public spending which might become particularly pronounced between 2020 and 2040. The Communication called for immediate reforms to ensure that every generation, including the baby-boomers, contribute to the necessary process of adjustment as overall public finances risk becoming unsustainable in many countries, thereby compromising the future equilibrium of pension and social security systems in general. At the same time it warned against public spending linked to ageing creating budget deficits and leading to intolerable spiral of debt. It has argued that such consequences would undermine the potential for economic growth and compromise the functioning of the single currency, thereby requiring pensions and health benefits to be seriously called into question, with considerable negative impact on the future wellbeing of pensioners and taxpayers\(^{12}\). The important Communication’s conclusion was the need for the comprehensive and sustainable approach employing a range of tools beyond retirement reforms such as easier access to lifelong learning which must reach everyone and, in particular, those with lower skills and in less favourable employment conditions.

In this context, the Council adopted in 2007 a Resolution on the "Opportunities and challenges of demographic change in Europe: the contribution of older people to economic and social development"\(^{13}\) which emphasized the need to increase the possibilities for active participation by older people. As a follow-up initiative to the Slovenian Presidency conference, a coalition of European NGO networks organised for the first time, on 29 April 2009, a European Day on Solidarity between Generations.

On the same day, the Commission issued a Communication on "Dealing with the impact of an ageing population (2009 Ageing Report)"\(^{14}\). By that time, almost all Member States have tightened the eligibility requirements for receiving a public pension, notably by raising the retirement age and restricting access to early retirement schemes. While pension reforms initiated in a number of Member States have been bringing positive results in terms of the sustainability of public finances the employment of older workers remained very low. Alongside reforming public pensions systems, many countries have introduced supplementary pension schemes or have even shifted part of the contribution from public schemes to mandatory funded and privately managed schemes (Bulgaria, Estonia, Latvia, Hungary, Poland, Slovakia and Sweden). However, the Communication called for pursuing vigorously the reform agenda, by


\(^{13}\) Council conclusions of 22 February 2007.

\(^{14}\) European Commission, (2009). *Dealing with the impact of an ageing population in the EU.*
investing massively in the quality of human resources and by removing barriers to the full use of its labour force, boosting the social innovation promoting good health, good education and good quality of life for current and future generations.

The Council adopted on 8 June 2009 Conclusions on "Equal Opportunities for women and men: active and dignified ageing", which urged the Member States to accelerate progress towards the achievement of an average employment rate of at least 60% for women and of 50% for older workers (55 to 64) by 2010 and to promote active ageing policies for older workers. It recommended to the Member States to take measures to enable older women and men to assume a variety of roles in communities, public life and decision-making.

On 30 November 2009 the European Council adopted Conclusions on "Healthy and dignified ageing" which invited the member States to address the potential workforce shortages in the health and social services sectors, and the ageing of this workforce, through lifelong learning, the development of professional skills and the implementation of policies and working methods, including human resource management and increased efforts concerning training.

As a result of policy developments the intergenerational solidarity has been included for the first time in the Treaty of Lisbon as one of the objectives of the European Union.

In 2010 the European Commission adopted a strategy for next decade "Europe 2020 – A strategy for smart, sustainable and inclusive growth" which focuses on the importance of the European Union's ability to meet the challenge of promoting a healthy and active ageing population to allow for social cohesion and higher productivity especially through its Flagship initiatives 'Innovation Union', ‘European Platform against Poverty' and ‘An Agenda for new skills and jobs’.

In its Communication on ‘A Digital Agenda for Europe’ adopted on 19 May 2010, the European Commission stressed the importance of ICT for ageing well, proposing in particular the reinforcement of the Ambient Assisted Living (AAL) Joint Programme. The Digital Agenda for Europe also recommended taking concerted action to increase the digital competences of all Europeans, including older persons.

Active ageing is further targeted by several EU programmes, such as the European Social Fund, the European Regional and Development Fund, the PROGRESS programme, the Lifelong Learning Programme, the Public Health Programme, the specific programmes on information and communication technologies and on socio-economic sciences and humanities in the Seventh Framework Programme for Research and Development, the Competitiveness and Innovation Programme with pilot deployment projects on ICT for Ageing Well and the Action Plan on urban mobility. The list of programmes and tools is annexed to this paper.

3. Learning for active ageing

Historically, education has been closely connected with young people as a way of preparing them for adult life. This has been valid both in terms of public expenditure on young people and education policy measures. The ageing of the population means both an extension of working life, and an unprecedented historic shift: the creation of a ‘third age’, where most people will spend a third of their lives in ‘retirement’. Therefore, an exclusive focus of education policy on skills for employment cannot meet the needs of this new group.

Education and learning has been recognised as an important element of active ageing. Low levels of education and illiteracy are associated with increased risks of disability and death among people as they age, and higher rates of unemployment. The WHO suggests education in early life combined with opportunities for lifelong learning can help people develop the skills and confidence they need to adapt and stay independent, as they grow older. If people are to remain engaged in meaningful and productive activities as they grow older, there is a need for continuous training in the workplace and lifelong learning opportunities in the community (OECD, 1998). The WHO defines as one element of an enabling environment the availability of lifelong learning and literacy programmes for seniors and suggests the need for the new paradigm which challenges the traditional view that learning is the business of children and youth, work is the business of midlife and retirement is the business of old age. The new paradigm calls for programmes that support learning at all ages and allow people to enter or leave the labour market in order to assume care giving roles at different times over the life course. This approach supports intergenerational solidarity and provides increased security for children, parents and people in their old age.

The European Union recognised the learning needs of older people in various policy documents. The lifelong learning perspective has been actively promoted in EU policy over the last decade and has put the spotlight on learning over the life course and the joined up approach to education and training, allowing flexible progression. The Commission’s 2001 Communication Making a European Area of Lifelong Learning a Reality and the 2002 Council Resolution on lifelong learning stressed the importance of lifelong learning for competitiveness and employability, but also for social inclusion, active citizenship, and personal development. Adult learning has been set as a vital component of lifelong learning which has the potential to be a partial counterbalance to an ageing population and to meet skills and labour shortages in certain sectors, but also addresses different circumstances or conditions for example the need for new forms of literacy such as ICT, health or financial literacy.

20 Lifelong learning is defined for the purpose of 2001 Communication as “all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competences within a personal, civic, social and/or employment-related perspective”.

The need to lift the barriers and to address the imbalances in participation in learning in order to achieve a more equitable picture was recognised successively by European Commission Adult learning communications “Adult learning: It is never too late to learn”\textsuperscript{21} and “Action Plan on Adult learning”\textsuperscript{22} endorsed by national education ministers in May 2008. The Action plan called upon all Member States to build an efficient adult learning system. Key messages included increasing equitable participation possibilities for adult learning, concentrating on the quality of learning approaches for adult learners, recognition of non-formal and informal learning, investments in the education of older people and migrants, and the importance of data gathering on adult learning.

**Policy challenges**

However, while policy developments and reforms in Member States are being driven by lifelong learning (LLL) strategies that include adult learning, their implementation remained a critical challenge especially with regards to the participation of seniors. Coherent and comprehensive strategies covering the full life-course are still not the norm, hence, access for seniors throughout life is still not a reality. Participation rates in education and training of older people remain very low in almost all countries although there are huge variations in participation in learning by older people across Europe.

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\textsuperscript{21} European Commission, (2006). Adult learning: It is never too late to learn

\textsuperscript{22} European Commission, (2007). Action Plan on Adult learning: It is always a good time to learn.
In general, Eastern European countries have lower rates (participation of 55-64 in Hungary is 0.3%; in Slovakia 0.7%; in Poland 1%) while Nordic countries have traditionally the highest. Finland, Sweden and Denmark have particularly impressive rates of participation by 55-65-year-olds in both lifelong learning and employment.

However, lack of monitoring and data deprives policymakers and researchers of a strong evidence base on senior participation in learning. Labour force survey and Adult education survey, both implemented by Eurostat, process data only up to the age of 64 and there is not any evidence of the participation of the "oldest old" in education and learning.

Barriers to participation for older people may be policy-related; informational, provider-related (entry requirements, cost, level of learning support, nature of learning outcomes, etc); situational (the cultural value attached to education; the extent to which the life situation or the family and social environment of the adult supports participation) or dispositional (the self-confidence of the adult as a learner, often linked to failure in previous educational experiences). The 2007 Adult Education Survey provided a quick glance at the obstacles reported as the most important by respondents who did not participate in education and training but wanted to participate.

Health and age has been mentioned by more than 15% of respondents as the most important obstacle inhibiting the participation in learning. Older people might need specifically targeted training and physical adjustments (such as the use of large print) which can compensate for reductions in visual acuity, hearing and short-term memory which are reported by WHO as common age-related disabilities.

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23 Cedefop, 2006 Cedefop Agora: promoting lifelong learning for older workers.
In addition to health obstacles, non-formal learning is considerably more common and seen as more convenient for older people than participating in organized learning activities\textsuperscript{25}. The reasons might be related to the rigidity of programmes, modes of delivery and assessment, lack of information advice and guidance; unsuitable course offer or unsatisfactory support mechanisms, such as transport, lack of financing. In this context, the EU has called upon Higher education institutions to open up to adult learners. Widening access for older students would require substantial changes in teaching practices and new challenges with mixed student classrooms.

Higher education courses are traditionally designed and employ teaching approaches, strategies and methods of assessment for students who are 18-22 years old and who have come directly from secondary school. Furthermore, many „third age“ students do not primarily wish to study towards a qualification – including those in who increasingly enrol after retirement. It is therefore important for them to be able to access programmes, courses and institutions outside degree or other credit-earning programmes.

\textsuperscript{25} At European level, the following definitions are used:

- **Formal learning** is typically provided by education or training institutions, with structured learning objectives, learning time and learning support. It is intentional on the part of the learner and leads to certification.

- **Non-formal learning** is not provided by an education or training institution and typically does not lead to certification. However, it is intentional on the part of the learner and has structured objectives, times and support.

- **Informal learning** results from daily activities related to work, family life or leisure. It is not structured and usually does not lead to certification. In most cases, it is unintentional on the part of the learner.
While designing learning strategies for older people it is also important to consider non-formal opportunities which may appeal more to older people than organised learning approaches of the courses. Reachable distance may also be an obstacle to enrolling in education or training and the effort required for going to the place of learning may reduce motivation and possibilities for participation. Rather, learning opportunities should come close to the older people, and be easily accessible both in terms of physical location and relevant content. Community learning and regional solutions should be better addressed across the EU.

As the lifespan increases, it will become more complex and less predictable than for previous generations generating demand for some kinds of learning and the content for learning. To maintain well-being of older people and manage life transitions to continue to make a useful contribution to the wider society, a need to develop new curricula for new life phases might be necessary. New literacy for the 21st Century includes ICT skills which represent a major challenge for older people and for developing older people's ICT-enabled learning opportunities. ICTs skills are very versatile and keep changing, highlighting the importance of lifelong learning during the whole life course. Hence, research approaches should not only concentrate on present problems but develop models to study and follow the learning needs of older people in the future. With increased complexity of financial services, the new skills for older people should address financial literacy as older people need to manage their resources more effectively.
Another area of particular importance for older people is going to be the learning for "senior citizenship". With demographic ageing, the political aspirations and political significance of older people will increase. Some researchers (Alan Walker, 2003; Anton Amann, 2000) urge policy-makers to adopt a life-cycle approach to understanding demographic ageing. Rather than concentrating on the fiscal, economic or employment aspects of ageing, the life-cycle approach relates the interaction of a wide variety of factors to individual and collective well-being over time. Adopting a holistic view invariably entails that successful ageing policy-making address all generations: ageing policy is fundamentally about providing, extending and safeguarding political, economic and social rights for citizens of all ages. Older people are particularly well placed to contribute to the local and national democracy processes because of their availability (more free time) and extended life experiences. They are often actively interested in what is going on in the world and therefore learning should target the political emancipation of older people and provide them with the basis for having a real say in decision-making process. In this way, older European citizens can take active control for their ageing. The 2006-2007 Survey of Health, Ageing and Retirement in Europe (SHARE) showed that 19 % of people aged 50 or over were engaged in general social activities (in clubs and political or community organisations) in the month prior to the interview.

**Intergenerational solidarity**

Another important challenge that remains to be widely addressed at national and European level is intergenerational solidarity and the potential of intergenerational learning. As the 2009 Flash Eurobarometer on intergenerational solidarity showed, more than 6 in 10 EU citizens disagreed that their government does a good job in promoting better understanding between young and old – only 27% of respondents in total agreed with this proposition. Intergenerational learning bridges age differences, enhances the transmission of cultural values and promotes the worth of all ages. Studies have shown that young people who learn with older people have more positive and realistic attitudes about the older generation. During the Slovenian Presidency of the EU a conference on "Intergenerational Solidarity for Cohesive and Sustainable Societies" was organised and put forward the idea of the European Year for Active Ageing and Intergenerational Solidarity, which is going to be implemented in 2012. It gives important political momentum to issues such as increasing awareness, the need to develop comprehensive intergenerational strategies and the impact of the intergenerational transfer.

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Contribution of the Grundtvig programme

Alongside various policy initiatives at both EU and national level in recent years, the Grundtvig programme in particular has widely addressed the issue of education and learning in relation to the ageing population. It has funded many projects, networks and partnerships to develop education and training for ‘older’ people, enabling them to better serve social and economic needs and to ensure their own well being and quality of life. Intergenerational learning has become an increasingly important dimension of this work. Since 2007 the Grundtvig programme has founded more than 350 projects aimed at learning for older people and intergenerational learning thus providing senior citizens with more ways to improve their knowledge and skills, facilitate their personal development, and boost their employment prospects.

Conclusions

When Michelangelo designed St. Peter's Cupola he was 83 and remained active until he was 89. When Benjamin Franklin was past 80 he helped draft the US constitution. When Winston Churchill reached the age of 65, his career was still regarded as a bit of a failure. Had he retired then, he would never have become prime minister and made the speeches for which he has become famous. Why then are we still ignoring the potential of older people whose finest hours could still very well be ahead of them?

The world is experiencing an important demographic transformation: the unprecedented ageing of the populations of almost all developed and developing countries. Raising the official retirement age to tackle new societal pressures is not enough and is not much use if people simply draw unemployment or sickness benefit instead of a pension. Older people will be under significant pressure not just to retain their skills, but to develop new ones. For many, this will require increased participation in education and training, both to keep up with new, ICT-driven skills needs and to retrain for new occupations. This prospect presents challenges at both individual and systemic levels. In this perspective, the lifelong learning has become pivotal for challenges linked to the rapidly ageing society. The European Year for Active Ageing and Intergenerational Solidarity, 2012, is timely in that it gives a Europe-wide platform for promoting learning as a crucial agent in active ageing, and our message that adult learning is for adults of all ages and must be extended to those groups preparing to stay on longer in employment and those preparing for retirement and the new phase of life that brings with it. One of the major policy responses to new challenges will be the renewed European Agenda for Adult Learning which will be adopted as a Resolution of the Education Council in November 2011, offering the possibility to focus attention on active ageing and skills for older people without which large numbers of ageing Europeans would be excluded not only from lifelong learning but from change and development at work and in society.
ANNEX 1: INTERESTING PRACTICES UNDER THE EU GRUNDTVIG PROGRAMME

Face it! Families and Active Citizenship Training Handbook (2006)
Introducing the FACE IT! approach to active citizenship and family learning, the training handbook aims to promote wider provision by other adult education organisations and, as a result, to encourage increased levels of civic participation amongst isolated, hard-to-reach and disadvantaged groups. The handbook is directly targeted at teachers, trainers, tutors and facilitators in adult learning and, across 6 individual chapters, includes concepts and methodologies, evaluation examples, materials and collaborative learning ideas, case studies and a range of support materials (the latter provided in original partner languages on an accompanying CD-Rom).

Format/Media: Publication
Languages: English (plus support materials in French, Italian, Romanian, Slovenian)
Target Groups: Trainers, teachers, tutors and facilitators working in adult education
Available at: www.faceitproject.org/resources_bank.htm
Contact: Anca COLIBABA (acolib@euroed.ro)

Handbooks for Senior Volunteers and Hosting Organisations involved in International Voluntary Service Projects (2003)
A series of handbooks, in 4 languages, targeting both older people (interested in spending time abroad as a volunteer) and potential volunteer host organisations. The developed handbooks, in addition to introducing the general concept of volunteering, cover the practical aspects of going abroad or hosting a foreign visitor, as well as mutual expectations from both parties. Handbooks are each complemented by examples of good practice from different European countries.

Format/Media: Publication
Languages: English, French, German, Italian
Target Groups: Volunteers, NGOs
Available at: www.lunaria.org/downloads/archivio/?dl_cat=2
Contact: Davide DI PIETRO (dipietro@lunaria.org)

The Training Toolkit developed by the Empowering Health for the Elderly project aims at improving the skills and competences of persons working with the elderly. Guided by a training handbook, which also presents the overall training concept, the toolkit is divided over 2 key sections and covers training for health professionals and the teaching of elderly people to live healthier lifestyles. Links to course materials are provided in the form of active (embedded) links within the handbook text with the handbook itself provided in the 4 partner languages.

Format/Media: Toolkit
Languages: English, French, Italian, Spanish
Target Groups: Professional and volunteers working with Elderly
Available at: www.ehle-project.eu/en/project-tools.html
The ICT Training for Trainers (ICT4T) project aimed at enhancing existing ICT training provision targeted at senior learners through improving the skills of adult educators in working with this target group. A training course was developed, tested and implemented and comprised 8 course modules covering topics such as senior learners needs, accessibility, learning theory and learning activities. The training course was last held in 2008 although course materials, including a course implementation guide, a course description and materials and a concept guide - the latter in 5 languages - remain available for download and operate under a creative commons license.

Format/Media: Training Materials
Languages: English (concept guide also in German, Greek, Lithuanian & Spanish)
Target Groups: Teachers, trainers and other staff involved in lifelong learning; adult education organisations working with seniors
Available at: www.ict4t.net/?q=materials
Contact: Elvira REITSHAMMER (elvira.reitshammer@futurestudies.org)

The VOCH European Handbook brings together a collection of essays and articles and case examples which together provide an overview of volunteering in different European museums and cultural heritage environments. The handbook provides an initial overview of volunteering activity, across the 4 partner countries, prior to providing practical examples of volunteer training programmes. The handbook represents the results of 2 years of research, investigation and training activity.

Format/Media: Publication
Languages: English, German, Italian, Slovenian
Target Groups: Cultural organisations; museum staff
Available at: www.amitie.it/voch/index4.htm
Contact: Metka FUJS (metka.fujs@guest.arnes.si)

The MAP for ID (Museums as Places for Intercultural Dialogue) Handbook presents experiences, insights and reflections resulting from a 2-year development project involving museum partners from Hungary, Italy, Spain and the Netherlands. The handbook targets museum staff wishing to make use of historic collections in a learning environment and provides examples of historical and intercultural learning contexts adopted by project partners.

Format/Media: Publication
Languages: English, Italian
Target Groups: Museum staff
Available at: www.mapforid.it/index3.htm
Y a-t-il une Europe de la sagesse populaire?

The objective of this partnership was to collect and examine the inexhaustible resources of the popular wisdom expressed in proverbs, sayings and adages and try to find if, beyond the productions common to all mankind – universal heritage – there exists a set of proverbs specific to the European nations. The partners launched a vast collection of national proverbs, gathering oral accounts and written transcriptions. These were compiled, compared, classified and analysed according to the context and circumstances in which they were used. Comparing the points of view and the shifts in meaning, the partners explored the diversity of the interpretations, observing what, from one country to another, brings them together or leads them apart.

seVen - Senior European volunteering exchange network: promoting international voluntary service in Europe as an educational and lifelong learning tool for senior citizens

This network of 29 partners wants to create a European space where all the organisations involved in senior volunteering will be supported in the implementation of their mobility and exchange projects. SEVEN's members include NGOs, local governments, universities and research centres with at least 5 years' experience in the co-ordination and management of senior volunteer programs.

Available at: www.seven-network.eu

SenEmpower

The SenEmpower project intended to combine two aspects of civil society and the roles that seniors can play in it. On the one hand, the number of seniors who need support in being an active member of the local community will increase. Single, older women are particularly at a high risk of social isolation, but the same is true for other vulnerable groups of older people in marginal social contexts. Besides poor health and poverty, the most important risk factor for social exclusion is a low level of formal education. For these seniors, ways have to be found and developed to utilise their hidden strengths to enable them to participate in community life. On the other hand, a growing number of seniors are ready to work in self-help groups and initiatives on issues of public welfare, including the re-integration of isolated seniors into community life. Their contribution to social welfare is tremendous but needs to be acknowledged and supported by educational offers and cooperation at community level. Their locally based work is not usually integrated into networks, so they miss out on the transfer of knowledge and good practice. Given this background, the project aimed at offering training courses to members of seniors' self-help groups and voluntary work initiatives to improve their skills in empowering seniors, with weak family and social networks, to take a greater role in society.
Institut für Soziale Infrastruktur (ISIS) - Ms Edita Satiene, LT

Available at: www.senempower.eu

**www.golden-age**

The main topic of the project was introducing seniors to the IT. The partners focused on different aspects of teaching/learning process and also on how to improve the functioning of older citizens in the Information Society. The work was centered around 8 seminars, one in each partner-country. Each partner was responsible for planning and running one seminar devoted to one subtopic, and to run an Internet activity involving all partners.

Stowarzyszenie Akademia Półnicy Życia - Ms Barbara Kaszkur-Niechwiej, PL

Available at: http://goldenage.felk.cvut.cz/index/index_cz.html

**Teddybear**

Teddy Bear was an intergenerational learning project which offered benefits for all those involved. This Partnership involved older people (50+) from all sectors of the community, including those who were disadvantaged or suffering from disabilities or mild dementia/Alzheimer. They were invited to share their life stories with young children between 6 and 12 years old in primary schools. Project partners came from Finland, Italy, Slovenia and the United Kingdom. Teddy Bear is the project which most closely responds to Europe's changing demographics. The concept is that older learners have the opportunity to take part in reminiscence programmes and are given special opportunities to work directly with children and tell them their own stories. Ideas relating to celebrations, games, crafts and food were chosen as initial stimuli for the story telling. Later, activities such as skills demonstrations by the older learners based on their previous experience and visits to places associated with their memories, featured as part of the programme in all project areas. The project has had a positive impact on the older people who now more readily see themselves as learners and who have increased in confidence, built new relationships with young people, acquired new IT skills and in some cases become more civically engaged.

Educational Centres Association – M. Bernard Godding MBE, UK

Available at: http://www.e-c-a.ac.uk/teddybear/
ANNEX 2: EU FUNDING INSTRUMENTS FOR ACTIVE AGEING PROJECTS

**Lifelong Learning Programme**
The lifelong learning programme aims to: make lifelong learning and mobility a reality; improve the quality and efficiency of education and training; promote equity, social cohesion and active citizenship; and enhance creativity and innovation, including entrepreneurship, at all levels of education and training. Within the broad programme, several of the funding streams are relevant to active ageing issues, including providing support for teaching computer skills to older people, learning through networks and intergenerational.


**Grundtvig for adult education**
The Grundtvig programme aims to develop the adult-education sector to meet the changing needs of learners taking adult education and non-mainstream education courses. It seeks to improve the knowledge and skills of adults of any age to boost their employment prospects and facilitate their personal development. Local and regional actors can apply to Grundtvig to get funding for projects addressing some of the challenges presented by Europe’s ageing society. It has notably funded projects designed to help maintain and develop the skills of older workers and implement intergenerational schemes to teach entrepreneurship and mentoring.

**Senior Volunteering Programme (SVP)**
Run under Grundtvig, the initiative’s description explains that “volunteering has been recognised as a way of offering new learning opportunities to senior citizens in Europe, promoting the process of active ageing and emphasising the contribution of seniors to our societies. Indeed, senior citizens are a rich source of wisdom and experience from which society should derive far greater benefit than has usually been the case in the past.” It pursues the following objectives:

- increase the personal, linguistic, social and intercultural skills and competences of senior citizens through volunteering
- facilitate the contribution of older people to the development and implementation of non-profit activities for social benefit
- transmission of experience, skills and good practice between countries through active older people
- create lasting co-operation between the host and sending organisations around a specific topic or target group.


**Leonardo da Vinci programme for vocational training.**
The Leonardo da Vinci programme aims to support European citizens to acquire new skills, knowledge and qualifications and have them recognised across borders. Its supports projects on vocational education and training, which can be applicable to older workers. These include initiatives enabling people to train in another country, co-operation projects to transfer or develop innovative practices, and networks focusing on topical themes in the sector.

Transversal programme
The Transversal programme aims to ensure that all the lifelong learning sub-programmes attain the maximum possible benefit and impact. Local actors can use the Transversal programme to promote policy co-operation and research on ageing issues and challenges, break the language barriers faced by older people, develop innovative learning methods using new technologies, as well as to spread the results of lifelong learning projects.

Youth in Action programme
The Youth in Action programme aims to inspire a sense of active citizenship, solidarity and tolerance among young Europeans and to involve them in shaping the Union’s future. It promotes mobility within and beyond the EU borders, non-formal learning and intercultural dialogue, and encourages the inclusion of all young people, regardless of their educational, social and cultural background. It can be used to promote intergenerational exchange, understanding and solidarity.
More information: http://ec.europa.eu/youth

Europe for Citizens programme
This programme aims to engage citizens with the European project and policies of European importance, such as demographic change. It seeks to promote a European identity and improve mutual understanding and exchange across national borders. The programme supports citizens’ exchanges, town twinning, studies, and ad-hoc events. It provide possibilities for local and regional actors to develop activities to foster intergenerational dialogue, to discuss local policies around older people’s needs and demographic ageing and consider the role EU exchange and learning can play in identifying local solutions.

European structural and cohesion funds
The Structural and Cohesion Funds are focused on making regions more competitive, fostering economic growth and creating new jobs with 3 specific objectives:
• 81.6% of funds go towards convergence - closing the gap in income, wealth and opportunities for the poorest EU regions
• 15.7% of funds go towards reinforcing the competitiveness of the EU’s more prosperous regions
• 2.5% of the funds are aimed at promoting co-operation between regions to identify common solutions and good practice.

The Cohesion Fund
The Cohesion Fund is the primary financial instrument for achieving the convergence objective. It is spent within the 12 Member States that have joined the EU since 2004, plus Greece and Portugal. Spain is still eligible for a limited ‘phase-out’ fund. As part of creating jobs and growth in
poorer regions, the fund can be used to, for example, make their transport systems more accessible to all.

**The European Social Fund (ESF)**

The ESF supports both the convergence and competitiveness objectives, mainly through ‘soft’ approaches such as the development of human capital and promoting partnership for reform in employment and inclusion. It can be of particular use for local actors wishing to explore key active ageing issues, such as updating older workers’ skills, adapting enterprises to the employment of older workers; combating age-based discrimination in the labour market and training schemes, improved public services for older people and combating social exclusion of older people. It can be used to promote reconciliation of work and family life for older women caring for dependent relatives.

**The European Regional Development Fund (ERDF)**

Projects supported directly by the ERDF tend to be ‘tangible’ projects such as the construction of infrastructure. For those looking to address active ageing policy issues are the sub-programmes promoting co-operation between regions. The following sub-programmes are jointly funded by the ERDF and the participating Member States.

*Interreg IV*

Interreg supports co-operation between regions to exchange good practice, new ideas and strategic planning to achieve regional development objectives. The current programme is the fourth cycle of Interreg and has three strands, each strand has funded projects looking at development issues connected with tackling demographic change, promoting active ageing and fostering solidarity between generations, particularly around developing public services to meet older people’s needs.

- Interreg IVA - cross-border programmes supporting co-operation between regions with cross-border issues e.g. German-Dutch border.
- Interreg IVB - transnational programmes supporting co-operation between regions within defined geographical areas e.g. Baltic Sea area.
- Interreg IVC - co-operation between any regions within the EU 27 countries

*URBACT II*

URBACT II is the second incarnation of the European exchange and learning programme promoting sustainable urban development. It funds networks of cities to work together to develop solutions to major economic, social and environmental urban challenges. The URBACT II programme can be used to develop age-friendly urban policies and to facilitate the exchange of experiences on promoting active ageing.
More information: [www.urbact.eu](http://www.urbact.eu)

*Regions for Economic Change*

This initiative aims to support fast track networks (Interreg or Urbact) to speed up the transfer of innovative solutions into regional policies and programmes. It can be used to help spread and implement good practice on promoting active ageing and solidarity between generations to meet the EU 2020 policy objectives of smart, sustainable and inclusive growth.

**Technical assistance instruments**

There are significant amounts of EU technical assistance at Member States’ disposal, representing overall a total of 4% of all structural funds. This potential can be used in preparing, implementing and monitoring EU interventions. Some specific EU technical assistance support instruments have also been created to help the implementation of regional development projects and strategies. These are focused on providing additional investment and expertise to increase the capacity to deliver change at local and regional levels.

*Joint European Support for Sustainable Investment in City Areas - JESSICA*

JESSICA is a joint initiative of the European Commission, the European Investment Bank (EIB) and the Council of Europe Development Bank (CEB) to promote investment in urban development. JESSICA offers important opportunities for actions to create age-friendly cities, by adapting the urban environment to the needs of their ageing population and renovating social housing stock for older residents.


*Joint Assistance to Support Projects in European Regions - JASPERS*

JASPERS is a partnership of the European Commission (DG Regional Policy), European Investment Bank (EIB), European Bank for Reconstruction and Development (EBRD) and the KfW banking group. JASPERS aims to provide technical assistance for the implementation of cohesion policy and is therefore aimed at the poorer EU Member States. Key areas for JASPERS assistance of relevance in the context of promoting active ageing, include transport projects, including clean and accessible urban and public transport.


*The Seventh Framework Programme for Research and Technological Development*

The 7th Framework Programme (FP7) seeks to co-finance research, technological developments, and demonstration projects that provide answers to Europe’s challenges in the global knowledge-
based economy. It is designed to support a wide range of participants, including private companies, public organisations, research bodies and individual researchers. FP7 activities must have a European added value. It can fund active ageing initiatives such as: optimising the delivery of healthcare to citizens; enhanced health promotion and disease prevention; smarter, more accessible transport systems; demographic change; ICT for ageing well - social robotics and highly intelligent environments.


**The Entrepreneurship and Innovation Programme (EIP)**

EIP aims to analyse and promote innovative performance and practice in SMEs through targeted funding, networking and support services. It particularly covers issues of training, innovation, governance and the impact of enterprise policy. It could be used to develop expertise on the employment and training of older workers.


**The Information Communication Technologies Policy Support Programme (ICT-PSP)**

ICT-PSP aims at stimulating a wider uptake of innovative ICT-based services and digital content by citizens, governments and businesses, in line with the EU’s ambitious Digital Agenda 2020. The programme also support implementing ‘European Action Plan for Ageing Well in the Information Society’.


**The Intelligent Energy Europe (IEE) programme**

IEE is the EU tool for funding actions that encourage the use of renewable energy sources in Europe. It prioritises projects for accelerated mobilisation of energy efficiency, renewable energies and sustainable transport. This programme can be used for actions related to ageing and older people’s mobility.

More information: [http://ec.europa.eu/intelligentenergy](http://ec.europa.eu/intelligentenergy)

**The Ambient Assisted Living (AAL) Joint programme**

AAL is a specific joint programme, funded approximately equally by public funds (European Commission and Member States) and private organisations. AAL uses intelligent products and the provision of remote services including care services to improve the lives of older people at home, in the workplace and in society in general. The programme aims to overcome technical and regulatory barriers to AAL, foster and demonstrate innovative smart homes and independent living applications, exchange best AAL practice and raise awareness on the possibilities of AAL for Europe’s ageing population. It thus hopes to: extend the time older people can live in their home environment; improve the quality of life and social participation of older people; create new business opportunities; provide more efficient and more personalised health and social services for older people.

More information: [www.aal-europe.eu](http://www.aal-europe.eu)
European Research Council (ERC)
The ERC was established to fund high-risk, high-reward research at the frontiers of current knowledge. It funds groundbreaking proposals in three broad thematic groups: physical sciences and engineering; social sciences and humanities; and life sciences. Several sub-themes cover issues such as ageing, demography, cognition and public health, of direct relevance to active ageing issues.

PROGRESS
PROGRESS is the EU’s employment and social solidarity programme. Its mission is to strengthen the EU’s contribution in support of Member States’ commitments and efforts in creating more and better jobs; promoting social inclusion and social protection; and combating discrimination. PROGRESS funds European studies, data collection and observatories, provides legal and policy training, supports NGO networks - such as AGE Platform Europe - and runs public awareness campaigns on key issues.

Health Programme
The Second Programme of Community Action in the Field of Health provides funds to actions on issues such as: promoting health and reducing health inequalities; improving citizens’ health security; and promoting actions related to patient safety through high-quality and safe healthcare. It aims to increase healthy life years and promote healthy ageing. The programme aims to generate and disseminate health information and best practice on health issues. Priority areas and types of funding are decided annually in a new work programme.

Daphne III
The Daphne programme aims to prevent and combat violence and to protect victims and groups at risk. It can be used to fund projects on elder abuse and the promotion of adequate and quality care to the dependent elderly. DAPHNE has already funded a few projects on elder abuse, including on physical violence against elderly women, data collection on older women at risk of financial abuse and violence against elderly women suffering from Alzheimer’s. A Daphne project has created a Charter on the issue of elder abuse.

European Innovation Partnership on Active and Healthy Ageing
The pilot partnership brings together the range of demand and supply stakeholders to identify and overcome potential barriers to innovation around: prevention and health promotion; integrated care; and independent living of elderly people. It seeks to leverage financing and investments in innovation and improve coordination and coherence between funding for research and innovation at all levels and between all actors. It hopes to improve the framework conditions for uptake of innovation as well as the discovery of new solutions that deliver active and healthy ageing.
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Intergenerational learning with and through digital media

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Abstract

Existing studies on intergenerational learning refer primarily to the didactic design of intergenerational educational processes. The contents of intergenerational transmission of knowledge were mostly neglected. A representative survey in Germany indicated that – depending on the topics or learning contents – older people are not all to the same degree open towards intergenerational learning scenarios. However, the focus of existing research has so far mostly been on formal processes of learning and education, while the intergenerational exchange of knowledge taking place in the everyday (familial) side-by-side has, as yet, hardly been the topic of studies. The historical-sociological concept of generations is compatible with the analysis of intergenerational learning in thematic contexts strongly determined by generation-typical patterns of experience and action, as is the case with regard to the use of media.

Representative studies reveal a distinct differential for media use and ICT competence with regard to age. Empirical findings show the use of media and the media competence to be also dependent on socio-economic and educational background, as well as on social environments, individual living conditions and life styles. However, these factors lie transversely to the differences in age and partially superimpose these.

So far, studies on media use and media competences among older people, on the one hand, and studies on intergenerational learning and intergenerational exchange, on the other, can be considered two separate, rather isolated strands of research. This strict separation is to be abandoned by a current research project and both strands of research are to be merged in a common approach. This study investigates the development of media competence among older adults within the context of informal intergenerational processes of interaction. It focuses on examining the significance of encountering and exchanging with younger generations to the development of an interest in and know-how regarding the use of modern media on the part of older adults.
The study is based on the assumption that their own children and grandchildren and other younger contact persons help motivate older people to deal with ICT. Dealing with modern media opens up new opportunity structures for the interaction with younger people as well as possibilities to take part the life of younger family members. Further it is assumed that younger generations play a substantial role in the acquisition of media competences.

The investigation is of an explorative nature and since the questions raised are aimed at motives and subjective interpretations, qualitative research approaches constitute the project’s focal point. In preparation for the qualitative building blocks, a secondary analysis of the representative data collected by the EdAge Study is carried out. The data set comprises 4909 interviews with adults aged between 45 and 80. The evaluation of the data focuses on interrelations between behaviors regarding media use, educational behavior, contact with the younger generation, intergenerational, and informal learning. During the project, further data will be collected through 32 problem-centered qualitative interviews with adults aged between 60 and 80.

Within the framework of the standardized survey, data on the use of media by older people and their interaction with younger people in both everyday life and formal educational contexts were collected. Analyses show distinct correlations between interaction with younger people and behavior regarding the use of media; however, the cross-sectional survey did not allow drawing conclusions as to the causality of these interrelations. In this respect, relevant information is provided by qualitative interviews, which confirm a connection between use of media and social environment, especially with regard to the interaction with younger generations.

**Keywords:** media competence, ICT, intergenerational learning, generations, informal learning

**Introduction**

This paper presents the research project IGeL-Media, which was started at the end of 2010, is sponsored by the German Research Association and is being carried out at the Ludwig-Maximilians-University Munich. Under the title of “Informal Intergenerational Learning for Media Competence”, the informal acquisition of media competence among adults no longer economically active is investigated. The main emphasis is on determining the significance of the encounter and exchange between the generations for the development of media competence among older adults.

In the following, I will first sketch the theoretical background, the central research questions, and the methodological design of the research project. Subsequently, first empirical results will be summarized.
1. Theoretical background

Empirical studies do point to a harmonious coexistence of the generations (cf. Hanns-Seidel-Stiftung 2002). Still, the question arises whether potential fields of conflict remain irrelevant simply because the generations live separate lives in different environments (cf. Schmidt/Tippelt 2009). In adult education, the concept of target-group orientation is applied and the programs are directed at specific age groups (cf. Tippelt/Schmidt/Kuwan 2009). In media education, in particular, there are target-group oriented programs such as computer courses for children, for parents, or specifically for seniors.

The results of research on adult education in Germany, however, clearly show that older people are looking for contact with the younger generation in educational programs, in particular, and studies on German adolescents reveal a high degree of respect for and interest in older people (cf. Hurrelmann/Albert 2006). Apparently, there is a rather strong interest in an intergenerational dialogue. The existing organized programs, however, hardly allow for this exchange. Other contexts in which generations could naturally meet do provide opportunities for such intergenerational encounters: what we have in mind, here, is the family environment, in particular.

In these contexts, knowledge is informally passed on, exchanged, or regenerated (cf. Trinder et al 2008). But learning processes taking place within the family are hard to access for empirical educational research and studies on intergenerational learning have so far mainly focused on organized educational events.

Following Siebert and Seidel (1990), three didactic scenarios can be differentiated in intergenerational contexts.

- Either, one generation clearly has advance knowledge compared to another; then one will learn from the other. In dealing with modern media, the classical distribution of roles among the generations is often reversed and the younger generation passes its knowledge on to an older generation.

- When a group of learners heterogeneous as to age is working together on a specific subject, learning will take place in cooperation and without any hierarchies.

- When the exchange among the generations and the change in perspective becomes the focus of the teaching-learning-event, this is referred to as learning about one another. We assume that, whenever generations jointly deal with digital media, there is a strong potential for learning about one another in these activities.

We adhere to the historic-sociological concept of generation formulated by Karl Mannheim (1928). This concept of generation is devoid of any hierarchical order of the generations and emphasizes the biographically and historically determined shared experiential background as a connecting element within a generation. How people deal with media is strongly
determined by individual patterns of action and experience; therefore this concept of generation is especially suited for our investigation.

Empirical studies, such as the German ARD-ZDF-Online- and Offline-Studies (cf. Eimeren/Frees 2008), the (N)onliner-Atlas (cf. Initiative D21 2011) or other international studies (e.g. Jones/Fox 2009), are but two examples of representative surveys which also investigate patterns in the use of media in old age. The empirical findings show, among other things, that media use and media competence depend on both living conditions and educational background.

In contrast to these empirical studies, the research project IGeL-Media focuses on the significance of media in older adults’ everyday life. Many aspects of daily life are facilitated by internet applications. To mention but a few keywords, online banking, online shopping, or the classical search for information via the internet could be named. Media competence is a necessary prerequisite for the use of these services. Following Dieter Baacke (1996), we conceive of media competence as the interaction of knowledge about the medium (media education), the ability to adequately employ the medium (media use) and to adjust it to one’s personal needs (media design), as well as the awareness of the risks and problems inherent in the medium (media criticism).

2. The research questions

Previous research projects (e.g. Tippelt et al. 2009; Strobel/Schmidt-Hertha/Gnahs 2011) repeatedly indicated that interaction with younger people within the closer social environment, in particular, provide opportunities and motivation to deal with modern media and that the intergenerational dialogue about these media technologies and their use constitute an important learning field for older people (cf. Eshet-Alkalai/Chajut 2010).

Intergenerational learning processes within the context of digital media have so far hardly been investigated. Therefore, we enquire in how far encounters and exchanges with the younger generation are of significance to the development of an interest and know-how in dealing with modern media on the part of older adults (cf. Warschauer 2004).

Of crucial importance in this are motives and occasions as well as courses and outcomes of informal intergenerational learning processes in the context of modern information and communication technologies.

The central research questions may be divided into three categories:

- First, we examine the role of information and communication media in the everyday lives and biographies of the target group. Of special interest in this is the question of how the individuals use the computer and the internet today. In addition, we want to know how this came about and how they learned to use the computer.
In a second set of questions, we ask whether and in what form an exchange on the issue of computers is taking place with younger people from the private environment. What is the role of family members in this and which role is played by contact persons from outside the family? We also inquire into the prerequisites, framework conditions and barriers for this dialogue.

Thirdly, we are interested in how older adults assess their media competence and where they consider their limits as to the use of the computer and the internet to be. In addition, it is of interest to us whether organized educational programs on the topic of media are attended and which further information sources are used in informal learning.

3. Methodological design

The methodological organization of the research project IGeL-Media is based on the idea of the triangulation of qualitative and quantitative data (cf. Treumann 1998). Based on a secondary analysis of quantitative data, qualitative interviews are carried out.

The secondary analysis is based on a set of representative data which has been collected within the framework of the project EdAge. As part of the Adult Education Survey, this project examined the educational behavior and educational interests of older adults aged between 45 and 80 (cf. Schmidt 2007; Tippelt et al. 2009). Evaluation of the data focuses on the scales on media use, on intergenerational learning, and on informal learning. The data are examined as to systematic interrelations by using descriptive and regression-analytical procedures. These evaluations concentrate on the sub-sample of adults aged between 60 and 80 because this age group also constitutes the focus of the qualitative surveys.

On the basis of insights gained from the secondary analysis of the EdAge data and the available literature, a guideline was developed for problem-centered qualitative interviews. In total, 32 interviews are scheduled. The field phase started in July 2011 and so far, 15 interviews have been carried out.

4. First results

In the following some exemplary results of the secondary analysis will be presented, that give an idea about the first step of the research design. Therefore we focus on the practices of media use and some predictors which are related to the use of digital media in older age.

4.1. Computer use and frequency of contact

We start from the hypothesis that the acquisition of media competence among older adults is in many cases stimulated and accompanied by intergenerational learning processes
within the private environment. Regular contact with the younger generation is a fundamental prerequisite for this dialogue.

![Figure 1a](image1.png) ![Figure 1b](image2.png)

On the horizontal axis in figure 1a and 1b, the respective frequency of contact is mapped. The yellow line shows the percentage of persons aged between 60 and 80 who use the computer, whereas the orange line shows the non-users.

Figure 1a shows the frequency of contact between older adults and members of the younger generation within the family and, and figure 1b, the frequency of contact with the younger generation outside the family. This differentiation is of importance because older adults in their post-employment phase of life much more regularly have contact with younger people within the family than with members of the younger generation from outside the family. 77 percent state that they have daily or weekly contact with the younger generation within the family. Only 57 percent report daily or weekly contact with the younger generation outside the family.

When looking at frequency of contact with the younger generation within the family, no statistically relevant differences can be discerned between computer users and non-users. If one looks, however, at frequency of contact with the younger generation outside the family, then the difference between computer users and non-users is indeed statistically relevant. As is shown by the Mann-Whitney-U-Test, the difference between the two groups is highly significant (Mann-Whitney-Test, p=0.001).
During the post-employment phase of life, computer users older than 60 tend to have more contact with the younger generation outside the family than individuals who do not use a computer in this phase of their lives. With regard to the qualitative interviews, these findings imply that both contacts with the younger generation within the family environment and contacts outside the family have to be addressed.

4.2. Regression analysis

The logistic regression analysis was used to determine variables which allow predicting the probability of occurrence of the use of the computer in the group of adults aged between 60 and 80. The model is based on details given by 1662 interviewees.

<table>
<thead>
<tr>
<th>Table 1: Logistic regression analysis</th>
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<tbody>
<tr>
<td><strong>Do you use a computer?</strong>&lt;br&gt;(Categorie of reference = yes)</td>
</tr>
<tr>
<td>Constant term</td>
</tr>
<tr>
<td>Continuous variables</td>
</tr>
<tr>
<td>Age</td>
</tr>
<tr>
<td>Participation in cultural activities</td>
</tr>
<tr>
<td>Migration background&lt;br&gt;(Categorie of reference: born abroad)</td>
</tr>
<tr>
<td>Born in Germany</td>
</tr>
<tr>
<td>Status of employment&lt;br&gt;(Categorie of reference: not employed)</td>
</tr>
<tr>
<td>Gainfully employed</td>
</tr>
<tr>
<td>Sex&lt;br&gt;(Categorie of reference: female)</td>
</tr>
<tr>
<td>male</td>
</tr>
<tr>
<td>Level of schooling&lt;br&gt;(Categorie of reference: high)</td>
</tr>
<tr>
<td>low</td>
</tr>
<tr>
<td>medium</td>
</tr>
</tbody>
</table>

Explained variance: Cox und Snell: .268 Nagelkerke: .401 McFadden: .282

The model only shows variables which have a significant influence on the use of the computer. Those variables that could not be safeguarded against random errors were deleted.
Nagelkerke's R-square for this model is 0.401 and is to be considered as “good” when applied as quality measure for the model. Accordingly, the percentage of the declared variance in this model amounts to 40.1%. According to the regression analysis, the variables age, cultural participation, gender, and school-leaving qualification have the strongest impact on the probability with which an individual aged between 60 and 80 will use a computer.

However, the model also shows that people from this age group who were born in Germany are more likely to use the computer. Furthermore, employment is of significant influence. Again, people who are employed are more likely to use the computer than people who are without employment. Since, within the framework of our project, we are above all interested in the private use of the computer, only people who are no longer employed are chosen for the interviews.

4.3. Computer use and cultural participation

The logistic regression analysis in table 1 revealed that cultural participation has a strong impact on computer use among older adults.

Participants in the study were given a list of nine fields of activity and were asked to state whether they had carried out any one of these activities during the past twelve months. Thus, data were gathered, for example, on the writing of texts, on attending concerts or theater events, or on visits to the movies (Tippelt et al. 2009, p. 126).

On the horizontal axis, the sum of the cultural fields in which the interviewees are active is depicted. Therefore, no conclusions can be drawn as to the intensity or regularity with which the respective activities are carried out.

Figure 2
On the vertical axis in figure 2, the percentage of computer users is depicted in yellow and that of non-users in orange.

Noticeable is that a quarter (25%) of the computer-abstinent individuals has not been active in any cultural field in the past twelve months and that 22% only carried out one cultural activity. With an increase in cultural participation, on the other hand, the percentage of non-users steadily decreases. Eighty percent of the non-users are not active in any one or in more than three of the fields of cultural activity enquired about.

In contrast, computer users are active in a greater number of cultural fields. As is shown by the graph, this relation is curvilinear. With an increase in cultural participation, the percentage of computer users increases up to participation in four different fields of activity (22%) and then it decreases again. Almost two thirds (61%) of the computer users are active in three, four, or five fields of cultural activities.

In summary, we can state that among those aged between 60 and 80 computer users are culturally much more active than individuals from that age group who do not use the computer. Within the framework of the secondary analysis, no statement can be made as to whether and in how far older adults use the computer in direct connection with their cultural activity. It is conceivable that, on the one hand, the computer is used to perform the cultural activity as such (e.g. writing texts or editing photos). On the other hand, it may well be that the computer is used to search for information on cultural activities. We hope to get answers to these questions, too, within the framework of the qualitative investigation.

5. Outlook

Based on the quantitative results, criteria for the selection of the interviewees were defined. The cases were chosen according to the following criteria:

- All dialogue partners were to be older than 60.
- The participants should no longer be in employment.
- Potential participants ought to have previous experience in dealing with computers.
- In addition, sub-groups are created. Three variables have proven to be of special significance: age, gender, and educational background. The aim is to get a sample of interviewees that includes in rather equal proportion women and men, younger old people and very old people, as well as people with and without higher school-leaving qualifications.

Within the framework of the quantitative analyses, factors favoring the intergenerational development of media competence could already be distinguished. The qualitative interviews are meant to further substantiate these results.
Within the framework of the qualitative analysis, on the other hand, we above all want to reveal the intergenerational learning processes as such, the motives and causes for learning. In this context, one of the central issues also is to determine which of the characteristics of informal intergenerational learning can be transferred to institutional learning situations.

Sources


The informal caregiver of the elderly person – from needs assessment to intervention in partnership

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1 Study conducted in the scope of the Project “Informal Caregivers of the Elderly: the survey of needs for development of intervention strategies”, financed by Fundação para a Ciência e a Tecnologia (FCT) with reference PTDC/CPE-PEC/103858/2008.
Abstract

Several studies show that western societies are getting old, namely in the European continent. The National Institute of Statistics (INE), in Portugal, estimates that by 2005 the aging index will be of 398 elderly people for every 100 young people. This is certainly one reason for the emerging role of the informal caregiver of elderly people. However, there are other reasons, such as the affective and moral obligation to care for elderly people in the families and to reduce the costs of hospital and other institutional care. Thus, nowadays family members and others have a major role in caring for the elderly, in particular if they are not autonomous. However, several studies also show the need to care for the informal caregivers. The task of caring for an elderly person is exhausting and stressful and the functional capacities of the informal caregivers are often threatened. There are several damaging symptoms at a social, physical and physiological level. For this reason there is a need to care for the informal caregivers. The C3I research Project has this as its main aim. One of its outcomes is, within a partnership with the Family Health Unit (USF) - “Meeting the Health”, to implement the “Office of Informal Caregiver Support” and develop intervention strategies by a multidisciplinary team.

This paper aims: (a) to generally describe the C3I research Project and (b) to present and discuss preliminary results regarding the profile of the informal caregiver of elderly people (ICofEP) of the USF - “Meeting the Health”.

The results to be presented emerged from a study aiming to characterize the profile of the ICofEP as well as their level of satisfaction towards the support they have. Data have been collected through the questionnaire COPE-CUIDE and analyzed with the PASW 18.0. The sample consists of 55 ICofEP. The results indicate that informal caregivers are predominantly female, between 51 and 71 years old, married, retired or housewives, daughters/sons and spouses that provide care for more than a year. All of them refer that they do not receive any support from health staff and social services. They consider to be in reasonable health although they also mentioned that the caregiving to the elderly has negative effects on their physical and emotional health. Based on the results found we discuss some strategies to be developed within the C3I Project.

Keywords: informal caregivers; elderly people; needs; care delivery; partnership.

Introduction

In Portugal, the population growth dynamics is characterized by the reduction of the natural balance, mainly caused by the decrease of newborns; by the positive migration balance and by the increase of the elderly population (65 or over) in the total population (Carrilho & Patricio, 2009). Simultaneously, changes in the incidence and prevalence of diseases occur. The chronic degenerative diseases become the main causes of morbi-mortality that, according to Brasil (1999), prevail on average between fifteen and twenty years.
As we know, functional changes happen in the elderly. Although they vary from person to person, they are found in all elderly people and are characteristic of the natural aging process, increasing the probability of the individual to develop chronic diseases (Silva, Galera, & Moreno, 2007).

Due to the current tendency of hospitals that allow early patient discharge in order to reduce the costs and provide the patient’s recovery next to the family, the elderly are quite often taken care of at home. However, the success for their home recovery relies on the existence of people prepared to care for them. People who care for the elderly person, the so-called caregivers, can or not be a member of their family (Messecar, 2008).

Studies report that relatives have been those responsible for caring for the dependent elderly at home (Lage, 2007; Santos, 2003; Teixeira, 2009). The main caregivers belong to the family and are responsible for giving medication, providing physical and emotional support, coordinating daily activities and creating a relationship with the dependent relative (Lauber, Eichenberger, Luglinbuhl, Keller, & Rossler, 2003). In Portugal, it is estimated that the number of informal caregivers surpasses 600 thousand although there are no official data (Huber, Rodrigues, Hoffmann, Gasior, & Marin, 2009).

Caregiving constitutes a burden for the informal caregivers in physical, emotional and financial terms. The most negative repercussions are depressive disorders, anxiety, psychosomatic and immune disorders and cardiovascular problems. (Lee, Colditz, Berkman, & Kawachi, 2003).

This reality makes it necessary to develop an educational and support intervention program aimed at the informal caregivers of dependent elderly people. This program is intended to develop means that allow the caregiver’s promotion of health and prevention of diseases, therefore contributing to the improvement of their quality of life.

There are several types of intervention programs aimed at informal caregivers such as psychologists, individualized or in groups, support groups, family intervention, psychoeducational; however, studies reveal that although people opt for interventions in group, the results are considered limited (López & Crespo, 2007; Sorensen, Duberstein, Gill, & Pinquart, 2006).

According to Sorensen, et al. (2006) the multicomponent interventions, mainly those which combine educational interventions with psychotherapy are the ones which provide better results. For Messecar (2008) the caregiver’s characteristics are also associated to the intervention results.

This work aims to describe C3I project “Informal Caregivers of the Elderly: the survey of needs for development of intervention strategies” in general terms and discuss the preliminary results about the profile of the informal caregiver of elderly people of Family Health Unit (USF) “Meeting Health” in São Romão Coronado in Trofa, Porto district.
1. C3I Project

C3I Project started in May 2010 and will finish in 2013. As product of this project, we aim to carry out a deep diagnosis about the profile and needs of caregivers who are relatives of dependent elderly people and the implementation and assessment of a group of different intervention strategies such as (a) an Office of Informal Caregiver Support in partnership with the USF of São Romão Coronado in Trofa, Porto District, (b) a web-site to support the caregivers and (c) modules of training for informal caregivers.

In order to operationalize these objectives, some tasks, summarized in figure 1, were set. The operationalization also involves the project team which is made up by experts in health and education who carry out the proposed objectives coordinately.

![Figure 1: Tasks of C3I Project]

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Dayse Neri de Souza (PhD), Arminda Costa (PhD), Nilza Costa (PhD), Wilson Abreu (PhD), Alcione Silva (PhD), Margarida Abreu (PhD), Marília Rua (PhD), Maria João Teixeira (MA), Susana Freitas (Undergraduate), Silvia Torres (Undergraduate), Ricardo Melo (Undergraduate) e Helena Teixeira (Undergraduate).
2. Methods

In this section the methodology used in the study about the informal caregivers of USF “Meeting Health” is described.

After national and international literature review about the instruments for collecting existing data, COPE Index was defined (McKee et al., 2003). This instrument was created in the scope of the European project Cares for people in Europe to assess the caregivers’ level of satisfaction and dissatisfaction when performing the task of informal health care and well being to the elderly person. It also makes it possible to define the caregivers’ needs. The COPE Index was adapted to Portuguese by Figueiredo & Sousa, (2002) and became known as CUIDE scale. The questionnaire consists of three parts. The first refers to the identification data in which the information of the interview method is required (structured, self-filling, self-filling by postal service) and the interviewer (research assistant, social service technician, doctor, therapist, nurse, other). In the second part the objective is to obtain information about the informal caregiver and the person being cared for. Finally, the last part corresponds to a Likert scale, which intends to assess the caregiver’s satisfaction/dissatisfaction. This study included questions related to the characterization of the 55 informal caregivers inquired, duration of role as caregivers of elderly people, the type of personal support they receive from the social services and how they assess their own health.

The sample of this study was defined according to the information obtained in the Family Health Unit in São Romão Coronado/Trofa/Porto about the elderly registered there. From the 1654 elderly people over 65 years old, 127 dependent elders living at home were selected. From these, some do not have informal caregivers. So, from the 127, 80 who are supported by informal caregivers were selected. The collection of data was carried out between March and August 2011, at the IC’s home always with the presence of nurses participating in the project.

To analyze the answers to the selected questions for this work, descriptive analyses were carried out with the use of PASW Statistics 18.

3. Presentation and Discussion of Results

The informal caregivers of elderly people that made part of our sample are married, female and sons/daughters, aged 50 or over, who have low level of schooling and no job.

Regarding the relationship between the informal caregiver and the person being cared for and the spatial distance between them, the results in Table 1 reveal that the caregiving to the dependent elderly person is carried out at the caregiver’s home (74,5%); the majority are sons/daughters (38,2%) and spouses (33%). The other 28,8% are distributed among siblings, children-in-law, friends, neighbors and other relatives. Various studies (Barnes, Given, & Given, 1995; Cooney & Di, 1999; Fernandes & Garcia, 2009; Hepburn, Tornatore, Center, & Ostwald, 2001; Mannion, 2008; Rosa et al., 2010) reveal that the degree of relatedness of the informal
caregivers are in most cases spouses and sons/daughters. It is to highlight that in the family hierarchy of commitment in what regards caregiving, the spouse becomes the main informal caregiver, followed by the single daughter or the one who has an independent life.

Table 1: Parental relationship and spatial distance between the informal caregiver and the elderly person

<table>
<thead>
<tr>
<th>Informal caregiver</th>
<th>Relationship</th>
<th>Distance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n/%</td>
<td>n/%</td>
</tr>
<tr>
<td>Son/daughter</td>
<td>21 (38.2%)</td>
<td>41 (74.5%)</td>
</tr>
<tr>
<td>Spouse/partner</td>
<td>18 (33%)</td>
<td>8 (14.5%)</td>
</tr>
</tbody>
</table>

Regarding the caregiving duration, the results of Table 2 reveal that in an added percentage 56.4% (n=31) caregivers care for someone in a period from 0 to 3 years, while 44% from 3 to 9 years. Consistent analyses about the burden on the informal caregivers attest that the time spent together and the type of prolonged disease of the elderly person creates stress and affects the normal balance of the family life, both personally and socially. Moreover, psychopathological disorders occur, depression being the most common (Barroso, Bandeira, & Nascimento, 2007; Rabow, Hauser, & Adams, 2004).

Table 2: Duration of caregiving to the dependent elderly person

<table>
<thead>
<tr>
<th>Duration</th>
<th>n</th>
<th>%</th>
<th>Added</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 to 6 months</td>
<td>9</td>
<td>16.4</td>
<td>16.4</td>
</tr>
<tr>
<td>6 months to 1 year</td>
<td>4</td>
<td>7.3</td>
<td>23.6</td>
</tr>
<tr>
<td>1 year to 3 years</td>
<td>18</td>
<td>32.7</td>
<td>56.4</td>
</tr>
<tr>
<td>3 years to 5 years</td>
<td>7</td>
<td>12.7</td>
<td>69.1</td>
</tr>
<tr>
<td>5 years to 7 years</td>
<td>4</td>
<td>7.3</td>
<td>76.4</td>
</tr>
<tr>
<td>7 years to 9 years</td>
<td>5</td>
<td>9.1</td>
<td>85.5</td>
</tr>
<tr>
<td>More than 9 years</td>
<td>8</td>
<td>14.5</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>55</td>
<td>100</td>
<td></td>
</tr>
</tbody>
</table>

In Table 3, briefly described, we have the results about the type of support given to the elderly people by the informal caregivers at various levels (physical, emotional and social). In other words, the results reveal that the informal caregivers completely dedicate themselves to
caregiving. The daily dedication to the dependent person has led many researchers to study the consequences of the caregiving process. Study conducted by Lee, Colditz, Berkman, & Kawachi (2003) refers that the burden on the caregiver has caused psychiatric morbidity such as clinical depression, anxiety, high blood pressure and cardiovascular problems, more frequently in women. The study results also suggest that the heavy burden on the spouse can increase the risk of coronary disease among women.

The financial burden is another aspect emphasized by the authors. They stand out that the extra expenses with doctors and caring for the patient can force the caregiver to reduce or even give up working what causes unbalance on the domestic finances and consequently creates stress on the caregiver and causes risk of coronary artery disease. Regarding the social aspect, Vásquez (2007) states that the family caregivers quite often forget their own needs and have their social life affected in mental health and their daily habits. However, the author draws attention to the caregivers' need to use coping strategies, since the elderly and their well-being depend on that. Our data confirm this reality described in the international literature.

### Table 3: Type of support provided to the dependent elderly relative

<table>
<thead>
<tr>
<th>Type of support provided to the elderly person</th>
<th>n</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical/ Personal</td>
<td>51</td>
<td>93</td>
</tr>
<tr>
<td>Domestic</td>
<td>54</td>
<td>98.2</td>
</tr>
<tr>
<td>Emotional/Psychological support</td>
<td>55</td>
<td>100</td>
</tr>
<tr>
<td>Social support</td>
<td>54</td>
<td>98.2</td>
</tr>
<tr>
<td>Financial support</td>
<td>35</td>
<td>64</td>
</tr>
</tbody>
</table>

When asked if they received any type of personal support by the social or health services, all (n=55) stated they received no type of support. The services provide support to the patient but not to the informal caregiver at any level. Some studies refer that the offered services do not meet the caregivers' need yet, since the burden involving all aspects of caregiving is quite heavy. Besides the responsibility with medication, personal hygiene and all the housework, the psychological factor becomes conditioning for the caregivers' well-being, and the depressive disorders symptom has revealed itself as the most frequent (Maidment, Regan, Katona, & Livingston, 2005). Studies reveal that there is the urgent need to give attention to the informal caregiver of dependent relatives, mainly of elderly people with chronic diseases.

This acknowledgement propelled psychological interventions to the informal caregivers in the last decade, especially for those who care for patients with chronic and psychological diseases (Eisdorfer et al., 2003).

In what concerns the question about the way caregivers consider their own health, the results in Table 4 confirm that 49,1% (n=27) consider their health reasonable while 36,4% (n=20)
consider it good. These results reveal the caregivers’ lack of perception regarding the consequences of the inadequate caregiving burden. The availability to serve surpasses the tiredness resulting from the multiple tasks associated to the caregiving and the lack of time for themselves (Neri, 2002).

**Table 4: The way informal caregivers consider their health**

<table>
<thead>
<tr>
<th></th>
<th>n</th>
<th>%</th>
<th>% Added</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very good</td>
<td>3</td>
<td>5.5</td>
<td>5.5</td>
</tr>
<tr>
<td>Good</td>
<td>20</td>
<td>36.4</td>
<td>41.8</td>
</tr>
<tr>
<td>Reasonable</td>
<td>27</td>
<td>49.1</td>
<td>90.9</td>
</tr>
<tr>
<td>Weak</td>
<td>4</td>
<td>7.3</td>
<td>98.2</td>
</tr>
<tr>
<td>Very weak</td>
<td>1</td>
<td>1.8</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>55</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

Concerning the informal caregivers’ opinion about the negative effect on their physical and emotional health caused by caregiving, the results of Table 5 point out that in an added percentage 89.1% (n=49) they revealed that there is “sometimes” and “often” a negative effect on the physical health, associated to the negative effect on the emotional well-being with an added percentage of 85.5% (n=47) of “sometimes” and “often”. These results confirm the discussion of the previous table. Studies confirm changes in the caregivers’ quality of life in the different aspects of health, such as physical changes, somatic symptoms, chronic fatigue, changes in sleep, cardiovascular diseases and damage to the immune function, psychic problems such as depression, anxiety and insomnia (Lauber et al., 2003).

It is believed that according to Sánchez (2001), the act of taking care is inherent to the marriage commitment for spouses. This role may reduce the tension caused by the caregiving. It is proved that there are changes in the quality of life, disorders in diverse aspects of health and physical problems.

**Table 5: Negative effects on the informal caregivers’ physical health and emotional well-being**

<table>
<thead>
<tr>
<th>Negative effects of caregiving (scale)</th>
<th>Physical n/%</th>
<th>Emotional well-being n/%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Never</td>
<td>3 (5,5)</td>
<td>1 (1,8)</td>
</tr>
<tr>
<td>Sometimes</td>
<td>18 (32,7)</td>
<td>22 (40)</td>
</tr>
<tr>
<td>Often</td>
<td>31 (56,4)</td>
<td>25 (45,5)</td>
</tr>
<tr>
<td>Always</td>
<td>3 (5,5)</td>
<td>7 (13)</td>
</tr>
</tbody>
</table>
Conclusion

The 21st century is characterized by the aging of nations; this fact makes caregiving to the elderly people an increasing challenge. In many countries, the care is informally provided, mainly by female relatives (Rosenberg, Jullamate, & Azeredo, 2009).

Portugal follows this tendency. As verified in our study, the informal caregivers are family members with no specific professional qualifications, who made themselves available to care for their dependent elderly people.

This work makes part of a broader research and aimed to describe, in general terms, the C3I project “Informal Caregivers of the Elderly: the survey of needs for development of intervention strategies” and identify the profile of the informal caregiver of the elderly people registered in the Family Health Unit “Meeting Health”.

Caring for someone can be a very demanding task and imply risks for the caregiver’s health. For Rocha, et al. (2008) it is essential to offer conditions so that relatives can successfully perform the role of informal caregivers. It is also necessary to know both the elderly person’s needs and the informal caregivers’ situation, that is, their needs, their beliefs, their values and their socio-cultural practices.

It is expected that all those involved in the project (researchers, health professionals and caregivers) feel motivated to focus their attention on the reality lived by the informal caregivers who are, many times, ignored by society and kept apart from the family decisions (Rocha et al., 2008).

On knowing the challenges faced by the caregiver, health professionals may actively take part in supporting the caregiver of the elderly people, valuing them and providing them with the support in caregiving, making them capable of dealing with situations which may create conflicts and stress and consequently contribute to the quality of life of the person being cared for, of the caregivers and of the other relatives (Rocha et al., 2008).

In this way, we propose to elaborate, implement and assess a program to meet the needs of the informal caregivers of dependent elderly people as far as training and support are concerned. From the comprehensive analysis of the context and still documented with all the theoretical information about the issue, decisions regarding the program to be carried out will be made, always involving the local health team and the caregivers. The triangulation of the information will make it possible to have a more informed idea about the situation. It is crucial that all the involved intervene and collaborate on the program elaboration. The program will comprise the objectives and the conditions, strategies and activities, resources, intervenients, schedule and assessment to be carried out. This stage is followed by the plan execution, which comprises stages, objectives, expected results, activities, people involved and assessment guidelines.
References


Old adults and educational practices: the case of a Portuguese Third Age University

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Abstract

The present work sets itself to study the educational activities aimed at the elderly within an non-formal educational context, more specifically within the framework of a Third Age University. According to the two main theoretical perspectives responsible for shaping the discussion and practices in the education of the elderly, namely the perspective of functionalist educational gerontology and the critical educational gerontology theories, the current study aims at equating the different educational activities that were developed within a Third Age University. Some lines of thought of the functionalist perspective such as the theory of activity assume that the elderly must keep active in order to avoid decline. Such envisaged activities are extensions of the activities undertaken during the working years and are believed to be beneficial to the retirees. However, this new busy and dynamic way of living the later years, involved in different educational, cultural and recreational activities is not a reality for all the elderly but is rather close to those with a Middle Class social standing. The analysis of Lenoir (1979) as well as Guillemard (1972) shows how the social practices of the retirees are conditioned by their respective social standing and the differences in the capital accrued through their lives, especially during the working years. Therefore, the access to culture and education can be limited to a restricted number of retirees and elderly.

On the other hand, critical gerontology aims at changing the situation regarding the education for the elderly, allowing for a real change in the lives of the elderly as well as a democratisation in their access to culture and education. Within this theoretical framework, the education of the elderly is not perceived as just a way to “kill time” or “avoid ageing” but something that overcomes these goals without denying them or rendering them impossible. It aims at the transformation of the reality of each student within the concept of a liberating education according to Freire or ‘empowerment’ according to Cusack.
These theoretical approaches allowed us to analyse a Third Age University in respect to its educational project and prevailing underlying educational theory, the objectives its set out to achieve, the educational practices and its intended student population.

We chose to undertake an empirical investigation inspired on the same methodology principles as the case study, as it allows for an understanding of the social processes that take place within the non-formal education context. This way, research took the shape of an ethnographic type study where fieldwork techniques were used such as observation, interviews and documentary research, among others. The fieldwork took place from April 2001 to October 2002.

One of the conclusions of the present study is that the “traditional” and “classical” school model is only partially rejected and we cannot say that the University’s educational/cultural project is guided by the liberating and emancipating education principles of Freire or the ones adapted by Glendenning and Battersby for the education of the elderly. It was also found that the university caters for a privileged group of elderly with a middle class social standing.

**Keywords:** policies of third age, educational gerontology and universities of Third Age.

**Introduction**

Our study aims at studying the educational activities developed in an informal framework of education of the elderly, in particular in a Third Age University. In the light of the two theoretical approaches that have shaped the discussion and practice of adult education, namely the functionalist and the educational critical gerontology theories, the different educational activities that took place in a Third Age University (TAU) are studied.

These theoretical approaches allow an analysis of the Third Age University in relation to its educational project, the prevalent conception of education, its goals, educational practices and audience.

After developing the theoretical framework and performing research of ethnographic nature, we set out to investigate during the course of this work if the Third Age University of our choice is aimed at middle class elderly, in terms of the most represented population. Also, the study will bear in mind that this social class will set itself apart from the negative image of sickness and poverty associated with older persons and, through the TAU, middle class retired people will be able to maintain a prestigious standing, setting themselves apart from a negative image of old age characteristic of a fourth age, but rather enhancing several autonomous abilities.

Within the chosen non-schooling educational context of the empirical investigation, we also wish to account for some dynamics and logic that represent the way stakeholders perceive, realize and practice their own educational and cultural projects for the elderly. Therefore, we
start this study with a brief discussion of the two main theories of educational gerontology followed by an analysis of the Third Age University.

1. The different theoretical approaches of educational gerontology

In the area of education of elderly adults there are two main references sociological perspectives. Taking the path of different authors in the area of educational gerontology (Glendennig 1990, 2000; Withnall 2000, 2002; Phillipson 1999; Cusack 2000; Formosa 2002), there are references to educational gerontology and critical educational gerontology pointing to the different theoretical approaches that have dominated the analysis and study and founded the practices in this field. Educational gerontology is normally associated with the functionalist approach while the critical gerontology is related to the critical theory.

1.1. The functionalist approach

This sociological approach dominated the field of gerontology up to the end of the 70’s. Since the 1940’s, this approach had at its core “the issues related with ‘adjustment’, ‘activity’ and ‘life satisfaction’” (Phillipson, 1999, p. 120).

The functionalist approach within the field of gerontology gave rise to two theories that have dealt with the study of ageing and issues related to old age. These are the Activity Theory and the Disengagement Theory. The disengagement theory was defended by Elaine Cumming & William Henry, in 1961, and it was introduced and tested in the book Growing Old. The Process of Disengagement. Essentially, the theory proposes that with age people withdraw from society and give up some of their social roles. According to this theory, this process is inevitable and many relationships come to an end and those that remain suffer quality changes. This process of rupture and separation, that is disengagement from others and society, varies from person to person in terms of the time it starts as well as the degree to which it affects different people. (Cumming & Henry, 1961, pp. 14-15).

Criticism to the Disengagement Theory was put forward by Bond, Briggs & Coleman (1996), who point out that the disengagement is not inevitable as the theory assumes but rather the non-occupation is a life style of some of the elderly. On the other hand, the theory foresee the disengagement of the elderly as serving the purpose of preparation for death and it does not demand nor defends a policy for third age that deals with its respective issues but rather implies a policy of indifference (cf. Bond, Briggs & Coleman, 1996.).

According to Loether (1975), the Activity Theory encompasses two main themes: Persistence and Change of Roles. The first – Persistence – was defended by Madox, and supports the idea that the level of activity should be maintained into old age.
The other theme in the Activity Theory was analysed by Robert Havighurst and deals with the issue of changing roles, as there is a change in the activities in old age. Further to this change, each individual must be flexible to adapt to it. It is assumed, from empirical research, the undertaking of multiple roles after retirement is positively related to happiness and good social adaptation during old age (cf. Havighurst, 1954, p. 309).

This role change implies that people have capacity to adapt to new experiences and this capacity or personal ability Havighurst (1954,p. 309) named role flexibility. To develop this personal ability one needs to invest in a variety of roles experienced positively during one’s middle years. These roles are considered by this perspective as adequate to the elderly as well as necessary so they can feel happy and adapted to society.

Because this perspective prescribes a variety of roles that the elderly have to undertake in order to attain happiness and be socially adjusted, we consider it is presupposed the elderly are a homogeneous group in social, cultural and economic terms and it does not take into account the social inequalities that characterise the reality of a social heterogeneous group. In “prescribing” an active lifestyle so that the elderly continue to be autonomous and “happy”, this perspective is concerned with certain social groups of elderly people that recognise themselves in such practices and therefore presumes a lifestyle of the elderly with a specific cultural, economic and social capital.

Such functionalist perspectives that dominated social and educational gerontology have received some criticism. One author who analysed such perspectives in social gerontology was Guillemard (1980, 1986). In brief, the author highlights that the elderly are represented as a unified and homogeneous group without taking into account the differences that arise in the ageing process in terms of several variables such as the social class that one belongs to. According to the author, the Activity Theory assumes a successful way of ageing and living through retirement that is characterised by a sustained level of mental and physical activity comparable to the standard of active adults, in order to delay the any physical and mental effects due to the biological ageing.

In line with Guillemard, other authors in the field of educational gerontology such as Glendenning e Battersby (1990) have also criticised the functionalist paradigm. These authors criticised the fact that educational gerontology consider older people as a homogeneous group and does not take into consideration the differences due to social class, gender and ethnicity. They argue that it is urgent to equate the concept of education of the elderly in terms of a socio-political framework so that the deterministic stance of this group can be overcome. They also alerted to the need to promote a debate on the objectives and goals of the education of the elderly, since many of the educational activities are aimed preferentially to middle class elderly and do not promote the democratization of education. Further to this concern on equal opportunities, the authors make the proposition that education should avoid the marginalisation of the elderly in society (Glendenning & Battersby, 1990, pp. 223-225).
1.2. The critical perspective and critical educational gerontology

This way the aforementioned authors subscribe to a new theoretical approach that was denominated critical gerontology.

One of the concerns of this critical perspective is to contribute to the resolution of social inequalities that the elderly experience on their daily lives through a liberating and emancipating education, following the line of thought of Freire amongst other authors. According to Freire, the liberating education implies that the banking conception of education is replaced by a liberating education that presumes a dialogue between two cognoscente subjects that equate the issue as “understanding critically how they are in the world, where and with whom they are” (Freire, 1975, p. 102).

This conception of education understands and presumes that education is not neutral and “is closely related to multiple instances of domination and subordination – and, essentially, to the struggles to deconstruct and construct those relationships” (Apple, 1998, p. 28). However and despite the domination aspect, it is possible to operate a social transformation in which the liberating education can play an important role, allowing to the dominated a critical understanding of that very same situation, within the limitations of education recognised by Freire (Freire, 1997, pp. 126-127).

According to Phillipson and Cusack, the marginalisation of older adults is starting to be conceived and considered not only in terms of social class, economic, cultural and social factors but also in terms of the marginalisation that retired people can experience because they are retired, over a certain age and excluded from the production sphere. Ageism and discrimination of retired people is also associated with stereotypes giving rise to some identity problems inherent to a post-modern society (Cusack, 2000).

2. Empirical research

We start by outlining the reasons that led to our choice of an empirical research of ethnographic nature or, in other words, a qualitative investigation, as it lent itself to explore intensively the subject of our study: a Third Age University in Portugal.

A research inspired in the methodology principles of the case study, in the weberian sense, allows the understanding of the social processes that take place in this non-formal educational context and also gather data to deeply characterise this reality.

This way, the present research followed a study format of “ethnographic nature” in the sense that not always the totality of the dimensions that characterise a full ethnographic study were utilised such as “long stay of the field investigator, the contact with other cultures and the use of broad social categories in the analysis of the data” (André, 1995, p. 28). The data gathering techniques used were: direct observation, interview, survey by questionnaire and
documentary research. The fieldwork at the Third Age University took place between April 2001 and October 2002.

3. Study of a Third Age University: The University of Culture and Leisure

The Third Age University under examination is located in a town in northern Portugal and we named it University of Culture and Leisure. We will not use the University’s real name in order to preserve the anonymity of the sources and safeguard the ethical principles of research in the social sciences (Bogdan & Biklen, 1994). Further more the name chosen attempts to translate the significant dimensions surrounding the organisation of this social space.

This university was born in 1994, from the will of a group of people with different professional backgrounds, some of them already retired. The path that led to its official recognition in 1994 first started in 1992, during a meeting of another association during which a teacher raised the idea of starting a Third Age University in town.

The secondary teacher, already retired, had previous work experience in another Portuguese Third Age University and contacts with a counterpart institution in Galicia, Spain.

During the path of consolidation and creation of the Third Age University, the contact with another similar institution in Oporto was an important milestone in providing information and advice as well as support in the planning and organisation of a project of this nature. Without going into much detail surrounding all the preparation work that led to the opening of the University of Culture and Leisure, the work group grew to 11 members that founded the cooperative, meeting the legal minimum of 10 members required to start the process.

3.1. Choosing a working model: Between social and schooling

The goals of this organisation are outlined in paragraph 3 of its statutory declaration, stating that retired people are to be socially integrated and have access to culture through educational activities and social support.

At the very start, the implementation of the previous goals wasn’t a peaceful process, especially regarding who should be deciding on such activities. The original working group members were predominantly retired teachers and that lead to an inception of this educational/cultural of this project very close to a formal educational context.

The similarities with a formal educational context started as soon as the Pedagogical Council (PC), a typical body in many educational organisations, was set up and conflicts arose immediately between the board of directors and the PC. At the time, the president of the PC of the University of Culture and Leisure considered it was the body’s exclusive competency to plan and decide on the activities to be implemented as well as other pedagogical matters.
Other social bodies such as the board of directors and the assembly were prevented from planning and making decisions on matters considered pedagogical. Furthermore, according to some members, the PC should be comprised exclusively of teachers. Often the PC decided on pedagogical matters related to cultural activities without consideration of previous decisions taken by the board of directors or without informing the board of such decisions.

Such ideas and attitudes caused internal conflicts, mainly between the president of the board of directors and the president of the PC. The former, who wasn’t a teacher, believed that the exclusivity reserved to the teachers on pedagogical matters did not make much sense because in his opinion all board members had the capacity to participate in decisions regarded as pedagogical without the need of being a teacher. The later, the president of the PC, was a retired teacher, defended this area as reserved to teachers.

This disagreement towards the PC did not seem to be a simple antagonism against this body but could comprise a broader aspect: the rejection of the idea of traditional schooling itself. Also in question is the decision capacity and the power of certain bodies or particular groups that comprise these bodies: those who are teachers and those who are not.

The justification supporting the non replication of a schooling model was based at first by the intention of the leadership group that promoted the idea but, in a second instance by the elderly themselves that attended the University, as the following text shows:

“If there was the intention to create a school, the initial commission and the legal consultant would have included this [idea] in the statutory regulations and instead of referring to a ‘cultural and social cooperative’ they would have referred to ‘an educational cooperative’! And even if at any stage a traditional school was created the natural evolution of things would force us to go back because, in fact, the majority of the people that attend (...) (The University of Culture and Leisure) do not want this! No one after 60 wants to go back to a traditional school!” (President of the Board of Directors, Magazine of the University of Culture and Leisure, 1999, pp. 16-17, parenthesis of our own authorship).

The disagreement that turned into a conflict on occasions ended at the end of the first year of operations of the University of Culture and Leisure, when the president of the PC left and the competencies of his respective body were redefined.

In an informal conversation, the president of the board of directors mentioned that the PC should no longer be an executive body but be limited to a consulting body only.

Apart from the controversy if the University of Culture and Leisure should be considered a school or not, another model was proposed regarding the future of the organisation: Should the institution be a Day Care Centre for the elderly.
The model of Day Care Centre did not evolve in the way as the school model did but was rather a questioning process about the possibility of the University to become a Day Care facility.

However, the issue is not a simple negation of both modes of operation. The goal is rather to extract the positive aspects of both models. The idea of what the University of Culture and Leisure should be is defined in the following passage of a magazine of this institution:

“That is why I have always defended that (the University of Culture and Leisure) should be something hybrid, something new that can have in all plenitude the good things from one and the other of those entities” (President of the board of directors, 1999, p.17, parenthesis of our own authorship).

The president of the board of directors continued to put forward his idea of what the University of Culture and Leisure should be, highlighting the dimensions that he considered to be characteristics of a schooling education but with certain particularities:

“(…) “didactic” activities without fixed or predefined curricular content, or rather permanently guided by the aptitude of the people attending the weekly work sessions. Where the “teachers” behave mainly as supervisors of the work sessions and the research carried out by their “students”. Where the choice of supervisors, and their previously established capability is an assurance of the technical and pedagogical quality of the subject at hand. Where there is no interference, always pernicious, between the didactic/pedagogic component and the social/administrative component” (President of the board of directors, Magazine of The University of Culture and Leisure, 1999, p.17).

Further to this, the president of the board of directors identified the importance of recognising the extra curricular/schooling areas that should be considered “positive” characteristics of a Day Care Centre. This way, he added that the University of Culture and Leisure should be:

“(…) a place where all who do not have much aptitude for didactic activities can have a place in their own right and want to take part in other cultural and social activities also foreseen in the statutory goals. In my opinion, “social support, educational and recreational activities” are the ONLY goals mentioned in the statutes of (...) (The University of Culture and Leisure) and should not, in any circumstance, be minimised and reduced to just didactic/school actions!”(President of the board of directors, Magazine of The University of Culture and Leisure, 1999, p.17, parenthesis of our own authorship).
However, this similarity with a Day Care Centre has many reservations and was made rather distant:

“(…) but, we do not want a Day Care Centre as a repository of people. We do not want to be that at all.” (President of the board of directors, Field Diary, 18/5/2001).

The *latent* goal of the University of Culture and Leisure is above all “not to be mistaken for an institution for the poor little elderly”, so they are not mistaken themselves for “poor little elderly” people and treated accordingly.

This *latent* goal manifested itself throughout the investigation, in particular in an informal conversation with the president of the board of directors about the removal of the University of Culture and Leisure from a list where it was classified as a social solidarity institution supporting the elderly. This was received with great pleasure, at least by the president of the board of directors, because the removal from the list meant that the university was no longer “confused or mistaken for an institution for the poor little elderly” and this aspect is not sought but rather refused.

The university’s link with culture, means above all a dissociation from the image of the elderly from which they wish to distance themselves. This translates into a cut from an image of the elderly as decrepit, deformed, sick, dependent and useless. This image is associated both to the elderly from the asylum as well as the elderly that suffer from physical and mental limitations that integrate the so called *fourth age*.

The identification with the terminology *third age* and the rejection of the word elderly is also a sign of the desired rupture with old age:

“I react in horror to the word elderly, however third age does not bother me, it is the age when professional activity ceases but there are other activities” (President of the board of directors, Field Diary, 18/5/2001).

### 3.2. Characterisation of students of the University of Culture and Leisure

The number of students has risen significantly throughout the years. The university started activities with 86 students in 1994 and in 2002 there were already 343 students.

In 2002, we performed a survey to 150 associates, the approximate number of students that effectively attended the university, and we had 74 replies.

This university is not an exception in the universe of similar institutions and we found a rate of 81% (60) of women in the total of the respondent population.

In this university the respondents have ages between 54 and 69. Despite the fact that this institution does not impose age limits to its students, we observed a higher rate of people
with ages comprised between 54 and 79. A more detailed analysis of the age distribution reveals a stronger trend, with the bracket 60 to 64 with the higher number of respondents (21) and the one with the lowest is 75 to 79, with only 7 people. The predominance in the younger age brackets is related to the fact people in their fourth age, considered to be the bracket 70-75, have greater mental and physical limitations due to disease or age related degeneration rendering the attendance of such institutions more problematic, as they often need other types of care. Therefore, Third Age Universities are frequented by an elderly population that is younger than the population attending Day Care facilities or nursing homes.

The great majority of respondents are retired (80%), with limited numbers of people still in the workforce (8%), very few despite being retired still have some sort of work (5%) and the remainder did not answer (7%).

As far as education is concerned the more represented set of the respondents have Curso Médio¹ (29.7%), this was easily predicted given the fact that this group is predominantly made of primary teachers, an area of study that did not have a Curso Superior as nowadays. There is also a high percentage with Quinto ano do Curso Geral dos Liceus² – 23% of the respondents. The percentage of respondents with Year 4 is close to that of respondents with Curso Superior 15% and 14% respectively.

We verify that the majority of respondents have average schooling capital and if we take into consideration the time when they were students, their diplomas are even more relevant, as access and equal opportunities to schooling were then restricted.

In the present work, the analysis of the standing in social class of the students is considered important because it will contribute to determine the population of elderly that attends the University of Culture and Leisure, keeping in mind the expectation of our research which raises the issue that the Third Age University is attended mainly by middle class older adults. Therefore, the analysis of the social standing of the students is an aspect that the research had to tackle.

The relevance of the class standing of the elderly population of the University of Culture and Leisure is also related to the perceptions and the ways of living the retired years vary and are conditioned by the social class each retiree belongs to.

The importance of social class as a factor that conditions the conception retired people have of retirement and the way they live it has been highlighted by different authors such as Lenoir (1979), Guillemard (1972, 1980, 1986) e Estes (1991). The first two have developed analysis and studies that relate the social class of retired people with the perception of retirement and the lifestyle of retired people. They reach the conclusion that the lifestyle of retired people is conditioned by the social class they belong to and Guillemard (1972) highlighted the fact that

¹ [Translation Note] Before the Bologna Agreement university degrees in Portugal were divided into Curso Médio – typically three years of study; and Curso Superior – Typically four to five years of study.

² [Translation Note] Quinto ano do Curso Geral dos Liceus corresponds roughly to Year 9 at present.
such a lifestyle is dependent/conditioned by the professional activity undertaken during their active life.

Other aspects that also contribute to the differences among the elderly are, for example, “biological factors and genetic predispositions but also and fundamentally (...) social and cultural factors” (Perista, Baptista, Freitas, Perista & Leça, 1997, p. 36).

The determination of the social class standing is an issue that can raise complex questions. One of these is the fact, especially in Marxist analyses, the elderly are no longer part of the production sphere and, as we know, in these perspectives the standing relative to production is determining to the analysis of the social class standing.

Estes (1991) highlighted the fact that in a situation of retirement, income and property continue to be the determining factor of social class standing in capitalist societies. And, in this case the income of some retired people comes from pensions that in turn are related to the professions held in the past. This way, the Welfare State replicates, through the retirement systems, the social inequalities based in social classes.

Despite these limitations, we consider relevant the analysis of social class of the retired population given that:

- The social classes determine the perception of retirement and the lifestyle of the retirees, be it through the internalisation of their living conditions that condition the practices or by the access to goods and services conditioned by the differences in capital that they hold;

- The amounts of the pensions are dependent of professions held in the past;

These two aspects underline the importance of the analysis of the social class of the retirees, keeping in mind the professions held in the past.

Therefore, taking into account the object and objectives of the study, we found important to choose an analysis of the social standing of the students following the typology of class and class fractions that Almeida et al (1988) conceived and made some necessary adaptations.

From this analysis we get a class standing of “pre-retirement”, that is a class standing resulting from the standing one had in the production sphere before entering retirement, allowing the inference from this former standing an approximate present social standing of each of the students.

In our study, we consider important the cultural capital in its institutionalised state, as we are dealing with an institution of educational and cultural nature. Therefore, the variables used were the profession held and the level of schooling. This is because schooling has an important role “in the structuring of the space of social class, be it through the impact it has in the division of labour or as a fundamental component- though not exclusive- of cultural capital and, therefore, of lifestyles as well as a specifically structural vector of social trajectories” (Almeida, Costa e Machado, 1988, p. 21).
Also in this study, the unit of analysis was the individual and we did not include the standing within the domestic group of each associate respondent as foreseen because the answers regarding partners were reduced and did allow an adequate analysis. Because of this, we limited ourselves to the analysis of the social standing of the associate respondents.

The analysis of the results reveals a great concentration of middle classes mainly a small contextualised technical bourgeoisie and the near absence of proletariat and bourgeoisie, although the later had a small number without significance. The overwhelming majority of the respondents belong to the small bourgeoisie, confirming the central hypothesis of the present work.

3.3. Analysis of the educational activities

Taking into account the different perspectives of educational gerontology, the educational practices of this Third Age University were briefly analysed.

Regarding the way the cultural activities took place that is if a “school” model is replicated or not in which the content is transmitted in an asymmetrical relationship between teacher and student, changing from activity to activity or better still from teacher to teacher. From direct observations made to 15 of the 20 activities in operation at the time, we observed diversity in the methodology in use as well as the type of relationship established between teacher and student. From situations where the teacher took a role of “supervisor”, stimulating the participation and involvement of the students with a certain closeness in the relationship; to situations where the teacher was more centralising without being “supervisor/promoter” but transferring knowledge with an asymmetric pedagogic relationship. In short, the diversity of educational situations resulted a great deal from the different characteristics of the teachers such as pedagogic character, scientific rigour and personality, reverting to the importance of the tripartite training of “teachers” (know/knowledge, know/how to, know/to be). The capacity to work with adults and the understanding of their critical perspectives of the world also influenced the way the activities took place.

In general, within this heterogeneous reality and taking into account the activities observed by us, there was a majority of educational situations where the teacher sought to establish a close relationship with the students, but not between two cognoscente beings, according to Freire, nor promoting a situation of empowerment. Many of the teachers “supervise” the students to interest them and involve them in the different activities but without seeking outcomes related with the critical analysis of the world. The interest registered in certain subjects or work activities, the closeness of the relationships established between certain teachers and their students as well as the recognition of the scientific knowledge of certain teachers translates into a high number of participants in these activities and in some cases lead to changes such as rostered classes, room changes or caps in the number of students.
**Conclusion**

As the presented study unfolded, we had the opportunity to observe the way the University structured itself with its great objective with a two fold repercussion. On one hand, there is the insistence in not being mistaken for a Day Care Centre. Therefore, a completely different model of operation from the Day Care Centre was chosen with the intention of distancing themselves from a social representation of the elderly as a person with limited capacity – physical and intellectual - sick and poor. On the other hand, the university, as part of its great objective, also wanted to distance itself from the “school” model in the “classic” or more “traditional” sense of the word. However, this image of school is only partially set aside and only in the aspects that are perceived as most negative. This denial of the school model is realised mainly by the denial of some members of the Board of Directors in accepting some of the ruling bodies of the school. Such was the case of the Pedagogic Council, comprised only by teachers with exclusive competencies in pedagogic issues. This gave rise to a decreased decision capacity of the Board of Directors during the first year of operations, as only teachers were recognised as competent in pedagogic issues.

Understandably, the assimilation of the “positive” characteristics of the School institution lends itself to the promotion of a value added image of the people that attend the University, presenting them as people with full capacity regarding their learning abilities, amongst other potentials.

Therefore, we could say that this Third Age University gave rise to a learning space that, at its own rhythm, promoted the aptitudes of those who attended it and also promoted a lifestyle, in the sense of Weber (1993), emphasising their physical and mental autonomy and therefore differentiating them from the elderly with less economic, physical and intellectual resources. However, during the investigation it became apparent that the “traditional” and “classic” model of School was only partially rejected and one cannot say that the educational/cultural project undertaken by the this University is ruled by the principles of the liberating and emancipating education preconised by Freire and adopted for the education of the elderly by Glendenning and Battersby.

We need to mention the little understanding evidenced by some of the teachers on issues pertaining to adult education and trends in pedagogy for adults and the elderly. This may have contributed to the replication of the model they knew and felt comfortable with, that is the model of school education.

Fundamentally, one could say the project of these Universities allows the elderly with a middle class social standing to keep their social standing while the Universities help their students to distance themselves from certain negative images of the elderly and old age.

At the same time, we can conclude that the retired attending this University, as they seek to distance themselves from a negative image of decrepitude and low social standing, fail to
reach a situation of *empowerment*, in the sense of Cusack, as they do not promote, amongst other aspects, an emancipating education.

**References**


Intergenerationality and the city: revitalizing the Central Park of Aveiro through intergenerational activities

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Abstract

During the last two decades, intergenerational programmes have been one of the paths through community intervention, bringing together different generations for a community common good. In the city of Aveiro, Portugal, the Infant Dom Pedro Park was a privileged place for conviviality during the 1980/90s; however, it is currently characterized as a neglected place that deserves more attention. This project (P=LHNS) seeks to foster dynamics to revitalize this park (preserving its historical, biological and social richness) through the promotion of intergenerational activities and relationships. Specifically, it aims at: i) responding a community challenge (to give life to the park) involving intra and intergenerational ties; ii) contributing to the community identity, recovering and combining the history and the stories of the park’s past and present to project its future; iii) promoting an intra and intergenerational collective memory, emphasizing the cultural, historical and social dimensions. This is a community project based on a collaborative approach: from, for and with the citizens. The intergenerationality emerges from the possibilities that the park creates for different generations and it is enhanced by the project activities.

Keywords: public spaces, intergenerationality, participation, community.

Introduction

Intergenerational programmes (IP) are a useful mobilising tool established in a basic human process that connects generations for a common good (Kuehne, 2003). The distinctive feature of IP is the combination of two (or more) persons at different stages of development that will interact, usually in a way involving others, which comprises various situations and contexts with the expectation of a relationship (Vanderven, 2001; Bostrum et al. 2000). IP are vehicles for the purposeful and ongoing exchange of resources and learning among older and younger generations for individual and social benefits (Bostrum et al. 2000). IP emerged in the 1960s in a context of profound social and demographical changes that confront communities with the challenge of maintaining social cohesion (Newman et al. 1997).

A set of trends have transformed the nature of intergenerational relationships in all societies in the last decades (Bostrum et al. 2000): an increase in life expectancy that consequently increased the number of older people; changes in the structure of the family; and a mutation in relationships between the young and old generations, often characterised by a lack of understanding of each other. These changes set up an increasingly need to develop social cohesion (Kuehne, 2003; Newman et al. 1997; Bostrum et al. 2000). Intergenerational programmes emerged in this context, based in two factors: the transmission of traditional culture by the older persons to the young; the need to unite generations (Bostrum et al. 2000). IP’s have been organized in three groups: i) older serving children and youth (as tutors, coaches and friends); ii) children and youth serving older people (as companions and tutors); iii) older adults
and youth collaborating in the service of the community (e.g., environmental projects) (Bostrum et al. 2000).

The project described in this paper is anchored in the last group of IP: citizens from all ages serving the community, in this case collaborating to revitalize the emblematic park of Aveiro (Infante Dom Pedro Park). While IP are an established theme, relatively little research or projects have focused on the public space level (Pain, 2005). However, intergenerational work provides a very promising direction for such work, though the potential of which is seriously under-utilized.

Public urban space went through many transformations due to: rapid growth of cities (the desertification of rural areas leads to more population living in urban areas); demographic shifts (e.g., more women involved in the work market and higher families mobility); and the quest for enhancement citizens quality of life (e.g., emphasis in healthy life styles) (Martinoni, Sassi, & Sartoris, 2009). Therefore, public spaces role within communities face challenges, needing reformulation and a new meaning within the communities.

The park of Aveiro, in its current structure, was inaugurated in 1927. This park fits into a romantic style, very similar to the English traditional parks. It comprises two parts, which were built in two phases, each having a specific meaning and utility for the citizens. The first was built in 1862 and it is known as “the garden” (in Portuguese: o jardim), it was built in an area previously used as a church garden. A bandstand was built there in a novel art style and the space is deeply connected with the music liberalization; it was an area where citizens went to listen to live philharmonic bands and folk music. The second part (known as “the park”; in Portuguese: o parque) was inaugurated in 1927 and comprises: a lake with boats, ducks and swans; a tea house; two greenhouses; a tennis court and a sport field for basketball, football and hockey; tables and seats to study, read or do picnics; and a rich set of fauna and flora, both autochthon and exotic. Globally, it presents a nice atmosphere right within the city.

Between the 1930 and the 1980s it was a privileged place in the city of Aveiro for socializing, leisure and conviviality, also identified as a place of community identity where: families took the children to play; youth went to study, leisure, sports and dating; adults and older persons use it to gather with friends and enjoy the space.

After the 1980s the park started to decay, mainly due to the lack of repairs; and, in consequence, fewer people went there; meanwhile some delinquency problems occurred. Simultaneously, other public spaces emerged in the city and life styles changed, thus the city park became no longer an option for the majority. Those who lived the park in its golden years kept the good memories but now they avoid going there because of insecurity feelings and, above all, to prevent seeing degradation that brings them sadness. The youngsters do not live the park existence as their ancestry. Nowadays, the Infante Dom Pedro Park can be portrayed as a neglected public place, needing attention (renews and dynamics) from the responsible entities and from the community.
Briefly, this park is a place of community identity for those who were born before the 1980s and mostly an unknown place for those who were born later. Community identity is a key force to build stronger and more socially balanced societies (Martinoni et al., 2009); and intergenerational relationships play a central role in nurturing that identity, which sustains social life and social change (though this role has been overlooked) (Edmunds & Turner, 2002). In addition, focusing on the quality of the built environment, in particular those embedded in the community history and stories can play a decisive role in community healthy relationships.

The project “UrbAging - Designing urban space for an aging society” (Martinoni et al., 2009), in Switzerland, showed that the places facilitating meeting and socializing activities are attractive and encourage people of all ages to attend them. A friendly public space should assure: high security conditions; intergenerational activities; activities that promote the meetings; playgrounds for children and adults. IP are increasingly bringing community residents together to discuss, evaluate, envision, plan, and improve their shared existence. For instance, other projects reported that participants have worked together to document and preserve local history (Generations United, 2002), influence the legislative process (Friedman, 1999; Ingman, Benjamin, & Lusky, 1998/99), provide a service to others in need (Hammack, 1992), and infuse multi-generational perspectives into plans for local community development (Kaplan, 1997). Although IP involving public places are still scarce, some projects were strong supports for this project by inspiring and helping to decide on issues like activities and involvement of partners.

This community project is entitled P=LHNS (Parque=Lugar de Histórias e Natureza para Socializar; Park=place of stories and nature to socialize), a formula to engage all citizens to renew the park’s social life. The goal of the project is to renew the park’s life and include activities to “bring life” to the park, attending to a community challenge for the park’s revitalization. Indeed, it did not involve repairs that were being planned by the city council. It involved as well: history and traditional culture transmission, assuring the continuity of community identity; and preserving and putting at community service the variety of autochthon and exotic fauna and flora existing in the park. It adopts an intergenerational (promoting intra and intergeneration relationships) and communitarian/participatory approach (involving citizens, public, private and third sector institutions).

1. Project: development, implementation and evaluation

This is a community project based on a collaborative approach (from, for and with the citizens) since research shows that this is the most effective approach in terms of adhesion, inclusion and sustainability (Pain, 2005). The project was carried out from September 2010 to July 2011 and involved around: 11540 participants from different generations; 45 partnerships and stakeholders. The steps of the project are described bellow; these were not held one following the other, some were simultaneous, therefore dates are provided.

1 Funded by the Calouste Gulbenkian Foundation.
1st Step - Project design and citizen’s involvement (May to December 2010)

The project was designed following the challenge Intergenerational (2010) by the Calouste Gulbenkian Foundation (CGF) to develop projects that promote intergenerational relationships (11 projects in the United Kingdom and 7 in Portugal). The project first draft was submitted to the CGF and won a prize for funding. Then, the project team started to spread the idea all over the community through social networks (facebook profile “Dinamizar Parque Aveiro” with 1800 friends; and a blog http://plhns.blogspot.com/), media (radio, local and national newspapers), e-mail and telephone contacts, and buzz. The project was very well received and many citizens, as well as formal and informal groups/institutions, became involved in what we feel as an informal civic movement.

2nd Step - Networking and partnerships (from September 2010 to March 2011)

After the first step and the strong adhesion, the project team felt the need to develop more formal partnerships. During this stage, six meetings and guided tours (performed by a biologist from the Herbarium of the University of Aveiro) were carried out with the partners in the park. These initiatives aimed to explain the project more deeply, to explore the suggestions of partners (in terms of meaningful activities to carry out) and to define more concretely how those persons/institutions would like to be involved (about 210 persons and 17 partners were involved). In addition, these activities also promoted cohesion among the network. In fact, this was a crucial phase that determined the posterior involvement and collaboration.

3rd Step – Preparing activities: exploring the park history and stories (October 2010 to April 2011)

The former steps helped defining some activities; in particular it showed that it would be relevant to develop actions that highlighted the park history in the frame activities (such as live music in the bandstand, handicraft exhibitions or historical and biological tracks in the park). To collect that information two methods were used: i) documental analysis to explore the park formal history and the city history (surroundings), comprising collecting films, maps and architectural plans from different times, pictures and postcards, articles at local and national tourism magazines, documents from the city council; this was accomplished with the partner’s collaboration (e.g., Municipal Library of Aveiro, City Museum and Museum of Aveiro) and also citizens, who were deeply connected with the park history; ii) in-depth interviews to explore how the park was lived in its golden years and how it could be lived in the present and future, performed to 26 individuals (18 individually and 8 through a group discussion), all over 60 years old, in order to collect their own life stories and memories involving the park (informal history).
4th Step - Implementing collaborative activities (April to July 2011)

Following the former steps, a set of activities that encourage intergenerationality were planned and implemented (table 1). The activities promoted intergenerationality in different ways: i) directly, by being designed to be appealing to all ages (such as the tracks in the park) or because they targeted families (for instance the family tree); ii) indirectly, since having several activities in park, attractive for all generations, would naturally create intergenerational encounters and relationships.

At this stage, the project partners were very active and had a concrete participation through the development of activities (following their previous suggestions). Several events for all ages took place in the park (table 1). Some were organized by this project team with the collaboration of the partners, while in others the role of the organizer was assumed by the partners and the project team collaborated (table 1.1). The partners’ involvement was a crucial strategy for the project development and sustainability.

Table 1 - Activities and participants

<table>
<thead>
<tr>
<th>Main organizer: project team</th>
<th>Main organizer: partners (project team as collaborator)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Event</td>
</tr>
<tr>
<td>3rd April</td>
<td>There is Life in the Park</td>
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<tr>
<td></td>
<td>Handicraft fair, sport activities, intergenerational</td>
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<td></td>
<td>tracks, workshops and live music.</td>
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<tr>
<td>5th June</td>
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<tr>
<td></td>
<td>There is Life in the Park</td>
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<tr>
<td>3rd July</td>
<td>Grandparent’s Day</td>
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<tr>
<td></td>
<td>Exhibitions; handicraft fair; live music; dance</td>
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<tr>
<td></td>
<td>event; intergenerational dance contests; yoga;</td>
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<tr>
<td></td>
<td>culinary workshop</td>
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<td></td>
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<tr>
<td>29th July</td>
<td>Grandparent’s Day</td>
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<tr>
<td></td>
<td>Exhibitions; handicraft fair; live music; dance</td>
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<td></td>
<td>event; intergenerational dance contests; yoga;</td>
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<tr>
<td></td>
<td>culinary workshop</td>
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<tr>
<td>10th December</td>
<td>Anniversary of the Declaration of Human Rights</td>
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<td></td>
<td>Human rights workshops and activities for school</td>
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<td></td>
<td>groups.</td>
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<tr>
<td>15th May</td>
<td>International Day of Families</td>
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</tbody>
</table>


<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>24, 25, 26th June</td>
<td>Parque@20’s Celebration of the park’s inauguration in 1927</td>
<td>Total: 4380 children: 470, youngsters: 680, adults: 2840, seniors: 390</td>
</tr>
</tbody>
</table>

5th Step – Evaluation (April to December 2011)

In order to exploit better knowledge on the project achievements and create guidelines for the future, a process of evaluation was performed. The project team decided to select some measures: a) number of participants, considering generations; b) number of partners; c) exploring improvement suggestions, as well as the meaning and relevance of the project’s initiatives for participants and partners.

The number of participants was registered for each activity (table 1); the total number of participants was 11540, with the following distribution by generations: children – 2598 (22.5%); youngsters – 2160 (18.6%); adults – 4704 (40.6%); seniors – 2125 (18.3%).

The overall partners and stakeholders achieved the number of 33, including: Aveiro city council and Glória’s parish council; 150 citizens; 4 schools; 10 citizens movements; 7 IPSS (Private Social Solidarity Institutions); 3 museums; 1 herbarium; 3 sports club; 2 theatre groups; and the Commission for Youth and Childhood Protection of Aveiro.

Suggestions, meaning and relevance of the project initiatives were taken through: surveys in the facebook profile, send by message and posted in the profile’s wall (117 persons answered this survey and about 300 persons were permanently making comments and suggestions); and through semi-structured interviews during the activities to 12 participants, as well as 8 partners. Data were submitted to thematic analysis.

Regarding the meaning of the activities and the relevance for participants, the following themes emerged:

i. Activities were significant, but the park needs repairs.
"It is truly a shame the park as it stands: abandoned. I think that this precious space in our city should be recovered as soon as possible! I enjoy participating in the activities, but repairs are crucial!" [João, 26 years old]

ii. Happiness, for seeing again the park with persons and activities.

"Since a long time I have not seen the park like this, so many persons and such animation." [Luísa, 74 years old]

iii. Inter and intragenerational interaction, because people of all ages were socializing and participating.

"I was amazed at the number of visitors and the care that many parents had in taking their children to the park; and also many grandparents with their grandchildren." [Francisco, 61 years old]

iv. Feeling the park as a relevant part of the community identity, a place of reunion and cohesion.

"I am very happy that, although I have left Aveiro 30 years ago, there is again life in the park." [Cristina, 38 years old]

v. Cultural and historical transmission, sharing culture, memories and identity with younger generations and along family ties.

"This is the park of my childhood. Now I am reviving the memories and the desire that this place, this nature spot, can be shared with our children and also grandchildren. So it won’t be lost in time. This is an admirable project that makes our lived dreams come true." [Fátima, 63 years old]

The suggestions to improve the park and the project focused on the following themes:

i. Improving the physical and structural conditions of the park, including renewing structures, cleaning the water of the lake, taking care of green spaces and improving the lighting.

"Recover all the wood bridges, walls, mosaics and stone seats ... The last time that I went to the park, all structures were highly degraded." [Carolina, 54 years old]

ii. More dynamics, promoting more activities that would make people go to the park.

"Renew the bandstand and have live bands every Sunday as it was in the past." [José, 38 years old]

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1 All names are fictional in order to protect the privacy of the people.
iii. Improving security, promoting a safer environment during night and day, through a lighting reinforcement and 24 hours guards.

“I love this park and I confess that I do not come here more often because it is so abandoned that I fear it could be dangerous. They should provide day and night guards.”

[Raquel, 23 years old]

Final considerations

This project is still under development; however its main goal is identified by the citizens as imperative and essential. Intergenerationality seems to have potential attending to this community challenge: transforming the park from a non-place or a neglected place to a place of community identity. The intergenerationality emerges from the possibilities that the park creates for different generations, and it is enhanced by the project purposes, both direct (i.e., to put different ages together in the same activity) and indirect (i.e., to have many ages in the same place and at the same time).

References


Possibilities of participation of older people in continuous vocation training in Lithuania

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Abstract

Relevance: In developing dynamic and competitive economy particular importance is given to the skills that become fundamental in pursuing the enhancement of employment. Therefore it is a matter of great relevance to foster such skills and capacities that become indispensable for individuals in the versatile modern working environment to be able to perform various types of work in the knowledge based economy. Substantial challenge for Lithuania at present is to provide possibilities for an individual to study and upgrade acquired skills.

Purpose of the research: The paper seeks to discuss the possibilities of older people to participate in continuous vocational training in Lithuania. Vocational training in contemporary Europe has been identified not only as the means whereby states can both retain their competitive economic edge, but also achieve social cohesion and stability. Employees’ skills must be constantly renewed enable for them to meet the challenges of ever-evolving technologies, increasing internationalization and demographic changes. Demographic factors (e.g., the preponderance of older people) have caused people to stay in the labour market longer, therefore both the rapid development of technologies and the increase in required information necessitate continuous learning. As a member of the European Union, both the Lithuanian government and its citizens face many challenges and must acquire the ability to meet new responsibilities. The development of vocational training has become very important in order to stay in employment and successfully pursue a career. The National Strategy To Overcome Ageing Consequences approved by the Government of the Republic of Lithuania in 2004 stresses the insufficient attention in Lithuanian educational policy to the problems of vocational training of older people, and that society is little aware of the importance of lifelong learning.

Methods: Descriptive statistical analysis, analysis of EU and national legal documents, analysis of research data are used.
Data: Research is based on national statistical data, data of representative national surveys on older people education carried out in 2009.

Keywords: older people, lifelong learning policy, vocational training system, participation, Lithuania.

Introduction

Countries throughout the world are undergoing rapid changes. Knowledge and skills are becoming competitive criteria in the market, which is characterized by rapid economic and technological change. Changes in the economy have altered the need for jobs and skilled workers. One of the most important features of today’s European labour market is the increase of older people in the job field. Especially in the last few years, the need to increase opportunities for the older people in economic activity is felt, especially when taking into account demographic changes. Aging of the population is one of the most pressing problems in countries of the European Union. It is recognized that in an aging society, more attention must be paid to the quality of life of the older people, because it is precisely this group of people that will determine the country’s overall living standards, social stability.

Currently, the most important tool of Lithuania’s policy regarding the older people is the The National Strategy To Overcome Ageing Consequences (2004), in which Lithuania committed itself to take action to resolve the older people problem on a national scale. One of the Strategy’s priorities – the employment of pre-pensioners as well as the older people, and the situation in the job market. The Strategy emphasizes that rapid changes in the employment of the population especially affects the status of older people in the labour market. The essential condition for the successful participation of the older people in the labour market is the increase of their participation in vocational training.

This paper seeks to discuss the possibilities of older people to participate in continuous vocational training in Lithuania.

1. Demographic changes and the learning environment

According to data from the Statistics Department of Lithuania, at the beginning of 2010, the number of the Lithuanian population was 3,329,000 people, which is 20,900 less than at the beginning of 2009. At the beginning of 2011, the estimated population of Lithuania amounted to 3244.6 thousand, which is 84.4 thousand less than at the beginning of 2010. At the beginning of 2011, the population aged 60 and older amounted to 701.2 thousand, or 21.6 per cent, while at the beginning of 2001 – 668.6 thousand, or 19% of the total population. At the beginning of
2011, the number of elderly men amounted to 249.1 thousand, that of women – 452.1 thousand, which is almost twice (1.8 times) as much.

The mentioned demographic tendencies give pause for thought in that the labour force becomes a resource, which must be given special attention. The main problem regarding aging of the population in the labour force is the decrease of the diminishing labour supply. With ongoing demographic aging processes, employment and thereby the numbers of the labour force, become more dependent on the activeness of older people (Neverauskienė, Moskvina, 2007). Depending on how successfully inactive members of the population are included in participation in the labour market, depends on whether the situation with job creation will improve and encourage economic growth of the country. Markets, technology, and work organization areas are continuously evolving and that means that the skills of those employed have to change even more quickly. Therefore, the vocational training of older employees and requalification becomes more important.

Currently in Lithuania there are 14 Labour Exchange Educational Centers within the Labour Exchange regulatory supervision system. Annually, the centers turn out 27 thousand individuals. In Lithuania, the supervision of labour exchange vocational training is carried out by the Lithuanian Labour Exchange Education Service at the Ministry of Social Security and Labour. The Service is divided into 7 territorial services of the Labour Exchange training and consultancy in major cities and its representative offices in smaller towns. It is the largest organizational system, actively dedicated to developing Labour Exchange vocational training, information and consultancy. For vocational training and consultancy in Lithuania during the 2009-2010 academic year there were 78 professional schools and 10 Labour Exchange training centers, which trained 43,8 thousand trainees and about 30 thousand individuals in adult continual learning programmes. The licence for formal education is issued to circa 250 institutions, which are involved in formal and non-formal education. Adult learning is taking place in the work environment, organized by employers with regard to the market requirements. About 60 thousand businesses in Lithuania are potential providers or users of educational services. According to data from the vocational training information file of the Lithuanian Labour Market Training Authority, 63.3 % of all adults who completed continuous vocational training programmes in 2009 were people of working age (from 25 to 54 years old), 5.7 % of students were over 55 years of age.

2. Needs and possibilities of the older people to participate in research of professional learning

In the *Strategy of Securing Lifelong Learning* (2008) it is recognized that a rather large part of the public in Lithuania is indifferent and not motivated enough regarding lifelong learning. It can be noted that education institutions, dedicated to educating older people and service networks for needs of older people, are not developed enough. In a competitive and dynamic
Elderly, Education, Intergenerational Relationships and Social Development.
Proceedings of 2nd Conference of ELOA

In today's versatile employment sphere, people can undertake various jobs and be able to work in a knowledge-based economy (Zemaitaityte, 2007). At this time, the fundamental challenge for Lithuania is to enable everyone to learn and to update their skills. Human resource development is particularly connected with the growth of the economy and social cohesion. A higher level of education leads to higher employment rates, higher productivity and lower unemployment levels. The training of those looking for a job, and the process of requalification of the employed, seeking to meet the needs of the labour market, involves all interested parties, authorities, employers and employees.

Vocational training, other active labour market measures, for the pre-retirement group and older people, are not yet widely applied in Lithuania. There are outdated public perceptions of the need for pre-retirement persons to continue learning. The opinion is that it is irrational to invest in their training and their adaptation to the labour market. Moreover, even the applied measures do not guarantee them jobs. On the other hand, some of the pre-retirement persons themselves don’t want to or are unable to change their profession, occupation or style of work.

In 2006, the Labour and Social Research Institute (DSTI) conducted research, The Needs of Lithuania's Elderly in the Areas of Employment, Education and Culture (Neverauskienė, Mokvina, 2007), in which 2,000 persons in Lithuania, older than 60 years of age were surveyed. About a third indicated that they would prefer to remain socially active citizens. About 15% of those surveyed, mostly persons up to 70 years of age, would like to find a job. Almost the same amount would participate in the activities of non-governmental organizations, clubs, participate in the artistic sphere, study. Only half of all those wanting to find a job were motivated by a lack of money. The remainder of those interviewed indicated their willingness to work or engage in any activity, because of a need to feel useful and like to communicate. The research showed that vocational training and requalification services were of little interest to Lithuanians older than 60 years of age. Those wanting to improve their professional understanding totaled 28 of the surveyed seniors or 1.4% of the entire total.

The Department of Statistics prepared An Analysis of Integrating Troublesome People into the Labour Market and Measures to Increase Their Employment (Neverauskienė, Mokvina, 2007). The research data showed a rather high motivation on the part of older people towards work, which could strengthen opportunities for vocational training (conditions established to improve qualifications), a wider choice of forms of employment, as well as adapting work places to the physical capabilities of the elderly. During the analysis, there was information about the desire of this age group’s employed and unemployed desire to continue working. If they had better conditions, more than half of this age group’s population, would extend their working life. About 70% of this age group’s individuals would continue working, if they had the opportunity to improve their qualification. And 52% – would work longer if they had a more flexible work Schedule. Another 51% – would agree to continue working, if work and health care conditions improved.
In 2011, the Social Information and Training Agency conducted an applied study of adult education, which analyzed the participation of the older people in learning (http://www.suaugusiuvisvietimas.lt/lt/publikacijos/). During the survey there were 479 elderly persons interviewed. Data from the survey showed that about one-fifth (21%) of the elderly (55-74 yrs.old), have participated in some kind of training in the last 3 years, in which they tried to enrich their knowledge and acquire new skills.

According to the research results, the older people participated more often in computer – digital literacy courses (11%) and entrepreneurship, management, and economic knowledge training (7%). Five percent of the respondents participated in psychology training, 4% in accounting, 4% in legal training, 4% in fitness training, 4% in foreign language lessons. In other training, less than 3% of the respondents participated. According to the survey, the main reasons for learning – the desire to excel, to broaden one’s horizons, and to express oneself. Also, an important motive for learning is the desire to improve one’s material situation (through additional work, to keep pace with the growing demands of the market). It indicated that 63% of the older people want to learn, because by learning they can grow, expand horizons – self-realization. Almost every second (47%) individual, who wants to study, stated that learning is boosted by growing demands of the labour market. There were 35% that stated they want to learn, seeking more knowledge, so they would receive additional work and improve their situation. There were 29% of respondents that indicated they want to learn, because they can interact with new people. Far fewer of the respondents stated that they want to study because they want to find another job, (11%), because their employer encourages studies (8%), because others are studying (2%). Respondents 55-54 years of age and persons with lower incomes (up to 600 Litas for one family member per/mo) most often indicated that they want to study in order to acquire more knowledge, want additional work and to improve their material situation. Civil servants and the employed on average, more frequently indicated that they are encouraged to pursue learning due to the continuously growing requirements of the labour market.

Residents who participated in training were asked who organized the training. According to research data, 35 % of the older respondents said training was organized by the employer – state institutions. The employer – a private establishment, organized 18 % of the older persons’ training. Much fewer of older citizens indicated that they participated in training organized by a university (11%), a private institution involved in the training of citizens (10%), other state institutions (9%), the Labour Exchange (7%) and others.

As observed by experts, who were interviewed in this study, in Labour Law, an employee’s options to obtain qualifications or improve them are regulated in a limited way – in essence only by the Learning Holiday Institute. The Labour Code’s 181 article gives employees the right for study leave. It is given for consultations, exam preparation and exam taking, lab work and preparation for diploma thesis work. This vacation time is paid, only if the employer sends the employee directly to study courses or the employer, on his own initiative, consents to pay for tuition fees. It should be noted, that regulation of learning holidays is limited exclusively to formal
Education. Laws and other legal acts do not foresee granting of learning holidays in those cases, when an employee is studying in non-formal education institutions (attending seminars, courses, etc.). Taking into account that the purpose of formal education, is to acquire some sort of state-recognized qualification, and not improve qualifications, it can be stated, that in the Labour Law of the Republic of Lithuania, there is no regulation of the possibility of qualification improvement. Regulation of this area is left entirely within the area of collective agreements and direct agreement between employer and employee.

As the research data shows, 2 of 3 (60%) of the nation’s older people would not want to study. Those are respondents aged 55-74, with mostly a primary, basic education, unemployed, and with low or average income as well as village inhabitants. Those who would like to study, but are not yet students, number 22% of the nation’s citizens 55-74 years of age. There are 3% who are now studying, with 15% undecided. It should be noted that the population, which is composed of 889,302 Lithuanian citizens older than 55 years of age (according to 2010 data from the Dept. of Statistics), 22% motivated in terms of educational initiatives of the elderly is made up of almost two hundred thousand (195,646) potential learners, whose learning needs are not met.

Analyzing non-formal learning outcomes of older people, an important role is ascribed to an action plan for increasing elderly learning and employment. It was prepared when implementing the National Human Rights Promotion and Protection Plan for the Republic of Lithuania, which was approved by the Seimas of the Republic of Lithuania on Nov. 7th, 2002, Resolution IX-1185 (Žin., 2002, No.7110-4853). It was implemented with the United Nations Development programme’s, “Support Implementing the National Human Rights Action Plan ” 5.1. with a goal of “Better Protection of the Rights of the Elderly.” Provisions of the European Union’s Employment and Social Policy influenced the contents of the Action Plan. It is necessary to create conditions that employable individuals, of any age, would remain for as long as possible in the labour force.

Planning the curriculum and forms, it is important to pay attention to the expectations of older people in terms of learning. The study highlighted that the respondents have a wide range of needs. They hope to improve their knowledge and skills, necessary for their profession. They hope to expand horizons, to better express themselves, to improve social relationships, etc. This shows the need to organize learning based on adult learning (andragogical) techniques, which emphasize the multidimensionality of learning: not only knowledge and skills, but also social – communication links, self-expression, the importance of increasing motivation for lifelong learning. In turn, Adult Education tutors should understand the methodology of andragogy and foresee appropriate qualification improvement perspectives.

The research data indicates, that in the structure of motives for learning, a main role is played by labour market factors. Learning is pursued due to the continuously growing requirements of the labour market. Therefore, primarily general competencies must be submitted, which can significantly contribute to the professional improvement of students, albeit
indirectly. The integration of older people into the labour market is complex and a controversial issue, which is influenced by many factors: the economic development of the state, the labour demand and supply relationship, employers’ attitudes towards the elderly in the labour market, the health status of older persons and work motivation, ability to learn, self-confidence as well as social security system possibilities. That is why creating and implementing employment and social integration programmes, it’s important to give this population group due attention, taking into account their specificity and potential.

Conclusions

In summary, we can state, that given market economy conditions, the problem of older employee professional vocational preparation, in line with the needs of the local market, is relevant. That is why training and competency development of this group is important. Seeking to resolve this, it is necessary to evaluate the demographic situation of the elderly and that which exists in the labour market. Meeting the social needs of Lithuania’s older population, preventing social exclusion and creating equal opportunities to remain active members of society, it’s important to direct their efforts to the increase of employment, as well as, possibilities to contribute to the improvement of public society. Vocational training accessibility, and development of flexible forms of employment, are considered to be priority actions. Learning and consulting services for elderly Lithuanians should be oriented towards building skills to function in society, training in the effective search for information, as well as strengthening self-confidence, meeting the needs for communication and personal development.

Currently, there is a greater need for professional vocational services, as more of older people are actively participating in the labour market. However, as statistics and special research data indicate, there is still a small number of older people participating or seeking to participate in the labour market or professional training. On the other hand, preparing social integration programmes for various population groups, it is necessary to stay in close contact with their representatives, in order to be able to best coordinate prepared measures conforming with the needs of specific groups.

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