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Universities of the Third Age: A Rationale for Transformative Education in Later Life

Marvin Formosa¹

Abstract

This article addresses the political context of third-age learning. It aims to expose how relations of power and inequality, in their myriad combinations and complexities, are manifest in Universities of the Third Age [U3As]. The dominant functionalist approach towards late-life learning is jettisoned in favor of a sociopolitical framework that asks: whose interests are really being served? and, who controls the learning process? It highlights the role of U3As in reproducing unequal relations in later life with special emphasis on positive ageism, elitism, gender, and third ageism. The article ends by proposing a possible way forward away from a neoliberal ideology through a transformative rationale for older adult education based on the values of social justice, social leveling, and social cohesion. Seven principles are forwarded: a transformational agenda, widening participation, critical geragogy, e-learning, preretirement education, intergenerational learning, and fourth age learning.

Keywords

universities of the third age, older adults, older adult education, critical educational gerontology, late-life learning

The University of the Third Age (U3A) is one of the most successful organizations in providing learning opportunities for older people. U3As can be loosely defined as

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sociocultural centers where third agers acquire new knowledge of significant issues or validate the knowledge which they already possess. The definition of the “third age” has emerged as an enormous bone of contention but it essentially refers to young-old adults (aged more or less in the 50–75 age band) whose everyday lives are no longer tied to the responsibilities of regular employment and/or raising a family (Weiss & Bass, 2002). Since their inception in 1972, U3A centers are now present in all the five continents and provide learning courses to millions of retired persons. Suffice to say that, at the turn of the millennium China alone contained some 19,300 centers with about 1.81 million members (Thompson, 2002). In 2009, Australia and New Zealand included 211 (64,535 members) and 60 (10,154 members) U3As, respectively (U3A Online, 2009), with the United Kingdom listing as much as 731 centers with a total of 228,873 members (The Third Age Trust, 2009).

Numerous studies have highlighted the social benefits that U3As hold for society, and their role in leading older adults towards optimum levels of active and successful aging (Huang, 2005; Lemieux, 1995; Swindell, 1999; Yenerall, 2003). U3As are credited to provide learners with a sense of purpose, autonomy, self-acceptance, and personal growth. They help older adults remain integrated in society and form their own social environment, while contributing to their intellectual potential and spiritual development. Yet, other studies have documented how the U3A movement may also function as yet another example of glorified occupational therapy that is conservative and oppressive (Alfageme, 2007; Findsen, 2005; Formosa, 2000; Okely, 1990). U3As have been found at fault for pandering to the interests and needs of middle-class elders, while also clinging to a “malestream” mode of operation where women learners are rendered invisible in the classroom setting. At the same time, U3As lack a “widening participation” agenda and remain insensitive to the learning needs and interests of ethnic minorities and those residing in rural areas. Such evidence should certainly not be put under the carpet. Rather, there is an urgent need to take stock of the politics of U3A practice, as well as providing suitable proposals for U3As to become a means of transformative education.

This article embeds the U3A movement in a critical rationale. Inspired by critical practice in educational gerontology (e.g., Cusack, 1999; Findsen, 2007; Glendenning & Battersby, 1990), it aims to expose how relations of power and inequality, in their myriad of combinations and complexities, are manifest in U3A practice, and subsequently, proposes a counterhegemonic rationale for transformative education in later life. In other words, the dominant functionalist approach towards late-life learning is jettisoned in favor of a sociopolitical framework that asks: whose interests are really being served? and, who controls the learning process? This task is presented in four key parts. While the first briefs the reader with the development of U3As, the second highlights their role in reproducing unequal relations in later life—namely, positive ageism, elitism, gender, and third ageism. The third constructs a rationale for transformative learning in later life. The final section proposes a transformative rationale for U3A practice based on the values of social justice, social leveling, and social cohesion.

In the spirit of Mills' (1959) observation that sociology transforms personal problems into public and political issues, a brief autobiographical note is warranted. As highlighted elsewhere (Formosa, 2005), I wear two overlapping hats. The first is that of a *critical educator*. My early years were characterized by a working-class familial environment. Lackluster grades at the end of college prevented me from entering university, finding myself employed as a remedial teacher in a vocational school. Witnessing firsthand the obstacles and pain experienced by youths from subaltern backgrounds motivated me to gain the necessary credentials to read sociology at the University of Malta. Reading Bourdieu (1974), and especially Freire (1970), proved to be a key watershed in my life, something that enabled me to make sense of my 2-year experience in remedial teaching while imbuing me with optimism that education has a potential to address structural inequalities and bring about social justice. My second hat is that of a *critical gerontologist*. A personal affinity with aging members of my extended family led me to pursue that interface between adult education and social gerontology. Equipped with Bourdieu's "thinking tools" and Freire's radical epistemology my key concern revolves around the unfulfilled potential of older adult learning to bring higher levels of well-being in later life. A running thread in my research is uncovering the extent that older adult learning is embedded in "activity theory" and "productive aging" rationales that overlook how structural inequalities in latter life limit the participation of subaltern elders in lifelong learning, while seeking to place the notion of social transformation on the agenda of late-life learning. The *raison d'être* underlying my appeal for U3As to embrace a transformational rationale is presented in more detail in a subsequent section.

Universities of the Third Age

The U3A phenomenon was born from the ideas of Pierre Vellas who recognized the combined vitality and longevity of many older persons in France, and believed that universities should promote a combination of instruction for seniors and gerontological research that improves the life of older adults (Philibert, 1984; Radcliffe, 1984; Vellas, 1997). Four major objectives were formulated for this new educational enterprise. These included raising the quality of life of older people, realizing a permanent educational program for older people together with younger peers, coordinating gerontological research programs, and realizing permanent education programs in gerontology. The first U3A in Toulouse was opened to anyone over retirement age, who was willing to fill in a simple enrolment form and pay a nominal fee. The learning activities were scheduled for daylight hours, 5 days a week, for 8 or 9 months of the year. The program proved to be so successful that other groups were created very quickly in other parts of France and European Francophone countries. Although there were some variations, all U3As being developed until the late 1970s enjoyed university affiliation, made use of university facilities that included the services of faculty academics as tutors, and offered programs of study tailored toward the needs and interests of older adults such as the medical and social problems of aging.

In 1979, adult educators from Britain issued an educational manifesto which was to be the heart of the British U3A movement. This stated explicitly that the goal of U3As is to replace the image of “elders” as intrinsically wise or dependent by a concept of the “elderly” as both teachers and learners (Midwinter, 1984). The first U3A in England was established in Cambridge in July 1981. Contrary to the French experience, the Cambridge U3A rejected the idea of prepackaged courses for more or less passive digestion, and demanded an intellectual democracy where there would be no distinction between the teachers and taught. Laslett (1996, p. 228) claimed that this manifesto empowered British U3As to “consist of a body of persons who undertake to learn and help others to learn” whereby “those who teach shall also learn and those who learn shall also learn.” Midwinter has put the French–British distinction very succinctly:

The earlier ‘French’ version of the U3A, for all its virtues, was about older persons negotiating a contract for services from an academic agency, if there was one conveniently located. Our view was always that third agers should be liberated to organise their own affairs and invest their own destiny. It was all about older persons being the creators, not the recipients, of a service. (Midwinter, 2003, p. 1)

Indeed, the British U3A model is renowned for its self-help approach that promotes a peer-style of learning: “a rare and provocative model of education in which, in the morning, a person may teach a class for her peers, and in the same afternoon have one of her ‘students’ become her teacher” (Brady, Holt, & Welt, 2003, p. 853).

In current times, five diverse models of U3As have been recorded depending on the form of linkage to a host university, the curriculum offered, and kind of participation offered to members (Levesque, 2006). In addition to the British and French models, one finds three other hybrid representations: (a) a Chinese model concerned with the maintenance and development of citizenship, cultural consolidation and philosophical reflection, and maintenance and development of bodily harmony; (b) a French-speaking North American model that holds a close link with a university, with classes and lectures given by University lecturers and outside speakers, but where the day-to-day management of these activities is in the hands of the students; and (c), the South American model which despite being very close to the French U3A model includes a distinct preoccupation for the most deprived and vulnerable sectors of the older population. Irrespective of the model adopted, all U3As pursue a nonvocational type of learning, aimed at human fulfillment and as a leisure activity.

Although a significant number of older adults join the U3A in the pursuit of new knowledge and to discover things that they were not previously aware of, the experience is more than an educational one (Hebestreit, 2006; Hori & Cusack, 2006; Huang, 2005, 2006; Yenerall, 2003). U3As fulfill various positive social and individual functions such as aiding lonely older adults to resocialize themselves in society by increasing their interests, as well as providing opportunities and stimulation for the use and structure of free-time that would otherwise be characterised by

inactivity. They also develop in members a lofty and progressive delight of life, increase the social integration and harmony of older persons in society, inject a sense of creativity in older adults, while making older adults more visible in society. U3As address the spiritual needs of older persons, as well as providing them with the opportunity to coordinate cultural activities, and thus, making their life more meaningful. U3As are also lauded for providing older adults an opportunity to keep their brains active, and hence, assuring good health and well-being in later life.

The Politics of the U3A Movement

The key motive underlying critical research in late-life learning is the awareness that the functionalist tradition, which prioritizes the adjustment of older adults to the shifting social order, often fails to help marginalized elders. The work of Glendenning and Battersby (1990) is now regarded as the cornerstone of critical research in older adult education. Inspired by Freire's (1970) pedagogy, they challenged the conventional wisdom that deems elder-learning, in whatever mode, to be a neutral enterprise and inherently good. Battersby and Glendenning advised a shift from the functionalist to a sociopolitical paradigm that (a) links the relationship of capitalism and education in later life, (b) asks whose interests are served by "mainstream" educational policy and provision in later life, (c) includes concepts such as emancipation and empowerment, and (d), celebrates the notion of "praxis"—that is, a dialogic relationship between tutors and learners, together with a reflection on the content and strategies of teaching. The study of Glendenning and Battersby (1990) inspired several studies to uncover the limits and deficiencies of "mainstream" educational provision for older adults (e.g., Cusack, 1999; Findsen, 2006; Hofland, 1994). A running thread connecting these studies is the drawing of attention to the socially constructed nature of third-age learning that may work in favor and against the interests of the status quo and vulnerable older adults, respectively. The remaining parts of this section focus on critical research detailing educational practice within U3As.

Positive Ageism

The vision guiding U3As is set upon the notion of "positive aging." Positive aging refers to a vision of aging that accepts the realities of genetically driven biomolecular process leading to death, but with the prospect of achieving healthy aging through lifestyle modification (Andrews, 2002). Positive aging is feted within older adult learning circles because in addition to promising that decrements associated with later life are actually modifiable and reversible, it provides a means of countering the negative stereotyping of older people. Education in later life is thus treated akin to "intellectual jogging" where the mental muscles are exercised so as not to atrophy (Midwinter, 1984).

Positive aging rationales are to an extent valid since many learners claim to find U3As as indispensable to overcome the various challenges brought on by later life

(Formosa, 2000; Huang, 2005, 2006; Swindell, 1993, 1997; Yenerall, 2003). Yet, one cannot underestimate the dark side of the “positive aging” rationale in life-long learning policies (Asquith, 2009; Slowey, 2008). In educational settings, positive aging operates within an “individual pathology” model that sees older adults as deficient following their loss of familial and work responsibilities. Positive aging overlooks how unique backgrounds and circumstances to later life—such as social class, gender, and age discrimination—have an immense impact on motivation and aptitude to participate in educational activities. The frenzy towards positive aging also renders U3As unable to consider the diversity of later life based on social and cultural preferences, and supports an environment where the most powerful perspective acquires a moral dimension to the detriment of those who end on the wrong side of the equation. While it implicitly castigates older people who do not wish to or cannot embrace the “busy” ethic as in some way deviant, it is “intellectual” and “high-brow” learning initiatives that derive most encouragement and approval. It is noteworthy that while there is some medical evidence concerning the beneficial results of continued mental stimulation in later life with regard to the maintenance of good health (Wolf, 2006), little of this work actually impacts on the education of older adults in a systematic way and with beliefs being nothing more than clinically unproven assumptions (Withnall, 2010). Aldridge and Lavender (2000) even report that some older adults experience “disbenefits” from participating in learning such as stress, anxiety, and relationship difficulties.

Another flaw of the U3A movement, arising from its choice of vision, constitutes an overwhelming self-absorptive mode of operation (Formosa, 2009a). U3As remain relatively oblivious of the changing contours of later life and society in general. Few U3As take advantage of the cyberspace revolution by providing e-learning opportunities for their members, with the majority still believing that participation in a classroom setting is a prerequisite for good practice (Formosa, 2002). A sensitivity towards the shift from a “modern” to a “late” capitalist organization is another absent link. Most U3As remain insensible to the increasing multicultural character of cosmopolitan centers, the different expectations of incoming groups of third agers towards learning (ranging from management issues to content of courses), and the blurring of middle- and third-age lifestyles where “retirement” and “work” may coexist without problems (Findsen, 2005). As Swindell (1999) claimed, by failing to adapt to the wider socioeconomic and cultural transformations U3As run the risk to meet the same fate as the sewing circles of our grandparents’ time. At the same time, positive aging focuses on learning as an end-in-itself activity that loses sight of the bigger picture. Older persons are not simply empty vessels for the deposition of liberal-arts knowledge but operate within a humanistic dimension that seeks to provide “meanings” to their respective social and personal environment. U3As overlook the social–psychological nature of adult aging characterised by an ongoing negotiation between structural and subjective worlds. Unfortunately, a defining feature of positive aging is to make older adults similar to middle-aged peers when the psychosocial processes of identity in later

life involves an amalgam of social ageism, personal integration, and bodily changes (Biggs, 2004).

Elitism

Although U3As are open to everybody, and offer no obstacles to those wanting to join, surveys have found membership to be exceedingly middle class. This has been a long-standing criticism, with the general consensus that U3A members constitute an “elite group” because of their advantageous education and financial background (Morris, 1984; Phillipson, 1983). The prevalence of middle-class members should not come as a total surprise considering the term “university” in its title. Working-class elders are generally apprehensive to join an organization with such a “heavy” class baggage. Moreover, the liberal-arts curriculum of U3As is perceived as alien by working-class elders who tend to experience “at-risk-of-poverty” lifestyles (Formosa, 2009b).

Although U3As following the British tradition seem to be more egalitarian, Swindell’s (1993) survey still points out that only 6 and 11% of U3A members in three Australian states hold “primary” and “less than 2 years secondary” levels of educational attainment, respectively. A more recent Australian survey found even lower results for these two variables (2.2% and 3.7%, respectively), while also reporting that 23.4% and 29.8% of members held undergraduate university degrees and business/technical certificates, respectively (Hebestreit, 2006). This survey also found that a high percentage (59.4%) of members worked in management and professional occupations prior to retirement. Similarly, but writing from a New Zealander perspective, Findsen (2005) claims that the Auckland U3A is heavily represented by professional people having higher levels of education than the norm. In Spain, the same remains the same with Alfigeme (2007) noting how members hold higher levels of education and monthly income compared to their same-aged peers. Spanish U3As also feature an exceptionally high percentage of retired pensioners and early-retired persons, and a relatively low percentage of pensioners who had not worked previously or been unpaid domestic workers. Such data highlight even more strongly its distinct classed character considering that the majority of members were women.

Anthropological research at the U3A in Malta detailed how learners displayed strong forms of middle-class dress codes, linguistic variations, etiquette, and gestures (Formosa, 2000). Their middle-classness was also evident by their pursuit of expressive lifestyles, eagerness to instruct themselves in the bourgeois ethos of freedom, and close affinity with traditional intellectuals. The predominance of middle-class adults at the Maltese U3A did not arise by coincidence but through a number of social closure tactics that made the learning experience unappealing to older adults with low levels of cultural capital. Most centrally, the choice of subjects—such as *History and Appreciation of Art* and *The Many Faces of Pirandello*—provided an alien environment to those from working-class milieus (Formosa, 2000). In a follow-up study, Formosa (2007) documented how for middle-class elders

the Maltese U3A ultimately served as a strategy to maintain their position in the class structure. As previous identities and statuses associated with one's occupational position are erased and become meaningless, retirement acts as a "status leveler" by putting persons from different class backgrounds closer together in the hierarchical social space. To offset such a leveling experience, middle-class elders enroll in the U3A to acquire the label of "cultured." In the way that books and paintings are used to impress friends and other social viewers, U3A membership becomes employed as a strategy of "distinction" (Bourdieu, 1984). Formosa (2000) also documented how the U3A in Malta utilized "didactic" pedagogical methods where lecturers took the role of expert dispensers of knowledge. During the few times that lecturers adopted a Socratic method, they simply provided a logical sequence of questions, which only resulted in confirming the accepted body of cultural knowledge that the learners had internalised in their socialisation. Lecturers assumed an authoritarian position as if they were the only beings in the room who possessed "knowledge," a position that was accepted uncritically and even willingly by the middle-class learning body.

Related to the elitist character of U3As constitutes the lack of members from ethnic minorities (Swindell, 1999). Findsen (2005) pointed out that given the multicultural environment of New Zealand, one would reasonably expect to see at least some Asian faces plus those of Maori and Pasifika people. Yet, this is not the case. The membership of the U3A in Auckland is heavily represented by members from the Anglo-Saxon community. He concludes that the exclusion of minority groups may not be deliberate but that there is no doubt that the projected ethos of U3As mirrors the values of the dominant groups in society. Consequently, ethnic minorities feel that they do not have the necessary "cultural capital" to participate in such learning ventures.

Gender

A gender "lens" finds U3As discriminating against both women and men. On one hand, all surveys uncover a positive women to men ratio: 3:1 in the United Kingdom and Malta (Midwinter, 1996; National Statistics Office, 2009), 4:1% in Australia (Hebestreit, 2006), and 2.5:1% in Spain (Alfageme, 2007) to mention some. Forwarded reasons for this imbalance generally include that women hold higher life expectancies, women leave employment at an earlier age than men, and that older women increasingly seek social companionship outside the home. While such explanations do make sense, they fail to tell the whole picture. Most importantly, they fail to explain why the surplus of older women is drawn to U3As and overlook that married women retirees remain accountable for domestic responsibilities. From a critical perspective, the chief shortcoming of such rationales is that they give the impression that U3As are fulfilling a beneficial empowering function for women. The reality is, unfortunately, otherwise.

Studies point out how third-age learning serves to anchor students in choices that were located in both social class and gender expectations about women's traditional

roles (Withnall, 2010). It is noteworthy here that despite the minority status of males in both membership and participation rates, male tutors at U3As generally outnumber female tutors (Formosa, 2009a). Formosa (2005) found U3A coordinators in Malta to perceive older learners as a homogenous population, a stand that is fundamentally “malestream,” considering the great divide in the type and volume of capital held by older men and women. The Maltese U3A persisted in overlooking the unique barriers faced by older women such as low expectations that they can participate successfully in educational pursuits, their difficulties reaching learning centers due to inadequate transport amenities, and their problems in finding leisure time when caring is so time-consuming. Formosa also noted how the Maltese U3A was also characterised by a “masculinist” discourse where women are silenced and made passive through their invisibility. In other words, despite older women being more numerous, they tend to be less visible with their male peers generating dominating learning discussions.

This is not the same as saying that men enjoy preferential treatments in U3As. The low percentage of men signals strongly that for a number of reasons the organization is not attractive to them. Primarily, third-age learning activities are promoted through avenues—such as during health programs on the broadcasting media or through leaflets at health centers—where most of the clients are women. Second, U3As are exceedingly “feminized.” Not only is the membership mostly female but so are management committees (Williamson, 2000). As Scott and Wenger (1995, p. 162) stated, older men tend not to want to become involved with old people’s organizations they perceive to be dominated by women. Third, U3A courses tend to reflect the interests of the female membership. Health promotion courses at the Maltese U3A, despite being open to all, were delivered by female tutors with a bias towards women-related health issues such as weight loss and osteoporosis (Formosa, 2005). U3As, hence, overlook that men relate to a culture that encourages them to “to cling to traditional roles and patterns of behaviour in which learning does not figure as hugely important [whilst perceiving] that engaging in learning is for women rather than for men and that learning does not offer tangible rewards” (McGivney, 2004, p. 89). U3As will continue to be seen as a women’s place unless they are promoted with male images, voices, and interests such as astronomy, botanical, and zoological studies. Women also have more interests than health issues, so that a more creative approach to the provision of learning programs may actually uplift U3A participation rates.

Third Ageism

The U3A movement celebrates and promotes its ethos at the expense of older and more defenceless people—namely, those in the fourth age. It is assumed that only mobile and healthy elders are capable of engaging in third-age learning lifestyles, and no effort is made to outreach those persons who due to various physical and mental difficulties are precluded from reaching classroom settings. At the same time,

U3As treat the third age as the epitome of the life course, and one finds few efforts to link with younger and older aged peers to partake in intergenerational learning opportunities (Findsen & Formosa, 2011). The underlying ideology here is that children, the middle-aged, and old-old persons have little, if any, contributive potential towards third-age learning.

U3As follow Laslett's (1996, p. 4) definition of the "third age" as a "period of personal fulfillment, following the second stage of independence, maturity, responsibility, earning, and saving, and preceding the fourth age of final dependence, decrepitude and death." As a result, the ethos of U3As is to target older adults who are young-old, able-bodied, and mentally fit. Such a philosophy must be applauded for counteracting the marginalisation of older adults in national and intergovernmental educational policies. However, it contains two crucial lacunae. On one hand, there are significant numbers of young-old persons facing mobility and mental challenges. Even at a relatively young age, many a times prior to statutory retirement, many older adults experience complications from strokes, diabetes, and neurological diseases so that their functional mobility and intellectual resources become seriously limited (United Economic Commissions for Europe [UNECE], 2010). On the other hand, old-old persons (circa aged 75+) who experience significant mobility and mental problems, even to the extent of having to enter residential and nursing care homes, may still harbour and strive for a "third-age" lifestyle (Jarvis, 2001). Consequently, while it is attractive to see the third age as a cohort-determined status, the third age is ultimately a *psychosocial* structure that influences and shapes the practices of all older adults (Gilleard & Higgs, 2000). The successful embodiment of a third-age lifestyle is contingent neither on chronological age nor on mobility and mental resources. Irrespective of their personal situations, all older adults have the potential to embrace and practice a desire to learn new things and encounter new experiences.

Therefore, U3As tend to neglect how educational opportunities can serve towards the personal and social development of housebound, frail and dependent older people, as well as others suffering from dementia and Alzheimer's (Swindell's [2000, 2002] work with U3A Online is a notable exception). As an emergent body of literature strongly demonstrates, the quality of learning participation, processes, and outcomes in "fourth-age learning"—as learning initiatives with older people facing mobility and mental challenges are being referred to—is impressive and exceeds all expectations¹ (Aldridge, 2009; Housden, 2007; Mehrotra, 2003).

Why a Transformative Education in Later Life?

Rather than simply enabling people to adapt to and reintegrate within the existing system, transformative education seeks to empower groups to confront the inequitable and oppressive system with a view to change it. This is considered as a pressing objective considering that with each passing year the world witnesses increasing "mass impoverishment, ... the ever-widening gap between North and South

... the constant rape of the earth ... besides the persistence of structures of oppression in terms of class, gender, race, ethnicity, sexuality, and ability/disability” (Mayo, 2003, p. 42). Embracing a conflict ontology, critical educators engage in forms of adult learning that make part of the global social and political movements struggling for change. Transformative education, hence, includes a strong social justice orientation (Mayo, 2009). A key influence in transformative education included Freire’s (1970) liberatory potential for compulsory education. For Freire,

There is no such thing as a *neutral* educational process. Education either functions as an instrument that is used to facilitate the integration of the younger generation into the logic of the present system and bring about conformity to it, or it becomes the “practice of freedom”, the means by which men and women deal critically and creatively with reality and discover how to participate in the transformation of their world. (Freire, 1970, p. 34—italics in original)

The aim of transformative education is thus to catalyze a fundamental shift in people’s beliefs and values, that includes the struggle for freedom, democracy, and equity.

Later life is not immune to domesticating and hegemonical policies that seek to subjugate the “humanistic” and “emancipatory” potential of older subjects. Neoliberalist ideologies on later life are premised on the argument that western economies have reached the “end of organized capitalism” (Lash & Urry, 1987) where self-identity has become a “reflexively organized endeavor” (Beck, 1992; Giddens, 1991). According to this view, the self arises as a “reflexive project,” built around the development of coherent, yet continuously revised, biographical narratives. Self-identities, the argument continues, operate on the basis of choice and flexibility, hence replacing the rigidity of the traditional life cycle with its predetermined rites of passage. A number of gerontologists, especially those sympathetic to postmodern rationales, deem the implications of these changes as positive to the lives of older persons (Featherston & Hepworth, 1989; but especially Gilleard & Higgs, 2000, 2006). Post-traditional societies, it is argued, 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 which takes into account the human diversity found in older cohorts. The greater material affluence and consumer activity, as well as individual assertiveness, of retirees are extolled to conclude that the third-age generation includes unprecedented potential to engage in cultural spheres of “identity refurbishment.” Hence, the pervasive “conventional wisdom” found in political statements that older adults never had it any better! As a direct result, late-life learning, as popularized in intergovernmental policies (European Commission, 2006; United Nations, 2002), has become synonymous with upskilling older individuals to help create a competitive workforce in the global marketplace. At the same time, most voluntary provision for older adult learning—such as the U3As but even other organizations such as Elderhostel and Learning-in-Retirement—adopts a functionalist-liberal framework where the goal of “adjustment” is paramount.

It may be true that growing old has become a more social, reflexive, and managed process. Yet, this does not necessarily mean that it is a wholly positive development or that postindustrialism have obliterated inequalities in later life. On one hand, Bauman (1996, p. 26) emphasized how in late- and postmodernity individuals “suffer, one might say, from a chronic absence of resources with which they could built a truly solid and lasting identity, anchor, and stop it from drifting.” Indeed, older persons tend to find themselves in social limbo, precluded from playing a role in both productive and consumer spheres due to mandatory retirement policies and the ensuing loss of income, respectively. It is also disquieting that the belief that older persons are experiencing unprecedented levels of agency and autonomy has led to the de-institutionalization of retirement—namely, “a dismantling of welfare state provisions making work essential for many elders rather than work being the result of active choosing” (Townsend, 2007, p. 21). On the other hand, the coming of late modernity did not result in the end of traditional forms of inequalities but only a “growth of new inequalities alongside the continuation of traditional social divisions” (Phillipson, 1999, p. 323). The key conclusion that emerges from the empirical literature is that social class, gender, and other types of inequality have not become less important in late modernity, but rather, that they become redefined and experienced in different ways to early times (Bradley, 1996). Instead of experiencing absolute poverty as during times of “modern capitalism,” nowadays subaltern elders face being excluded from whatever passes for a “normal life,” where a “normal life” represents a life of consumers, preoccupied with making choices among the panoply of publicly displayed opportunities for pleasurable sensations and lively experiences (Cann & Dean, 2009). At the same time, this must not draw attention away from the fact that a considerable number of older persons in high- and middle-income countries—as much as 19% in the European Union (a total of 16 million or approximately one in five)—are at the risk of poverty (Zaidi, 2010). Indeed, the transition to late and consumer societies may actually be advantageous for older persons owning comfortable volumes of what passes as dominant capital, but for subaltern peers—especially the working class, older women, ethnic minorities, and the old-old—this has only resulted in more acute competition for a diminishing welfare pie so that a substantial slice of their financial resources are spend on private health care services that in previous years were provided freely by the public sector.

Hence, there can be no doubt as to the applicability of the concepts and principles of transformative education to later life. The latter has the potential to challenge prevailing orthodoxies and provide a robust analytical framework from which radical adult educators can work effectively to lead older adults to higher degrees of emancipation and empowerment. In sum, there is an urgent need for an educational activity that resists the “the most ‘clever’ but nihilistic and paralyzing features” (Mayo, 2009, p. 277) of neoliberalist policies to liberate older adults (but especially the most vulnerable ones) from their “juggernaut” (Giddens, 1991, p. 28) lives.

A Rationale for Transformative Education in Later Life

Transformative education in later life follows Freire in being preoccupied about “how” and “what we are producing, who it benefits or who it hurts” (Mayo, 2003, p. 42). It is not driven by “what is” but by a vision of “what should and can be” (Findsen, 2005), in the hope that it leads to a world which, in Freire’s (cited in Gadotti & Torres, 1997, p. 100) words, is “less ugly, less cruel, less inhumane.” In late-life learning, this becomes possible if education illuminates the social and political rights of later life, enabling older learners to become in more control of their thinking. In the attempt of capturing the true spirit of Freire’s vision, I present seven key proposals for the practice of transformative education for U3A and elder-learning practices.² Such proposals are not intended as some magic wand that provides immediate and sweeping radical change. We should not fall into the trap of overestimating the extent that education can bring about structural change. As Nye (1998) found out in her attempts to organize a writing class for older persons based on a Freirean agenda, transformational experiments in late-life learning may actually fail to alter the social surroundings that older learners inhabit. Such proposals are put forward only as a possible platform from where to strengthen our democratic environment while aspiring for a qualitatively better life for ALL: the oppressed, the nonoppressed and generations to follow (McLaren, 2002).

A transformative(-functionalist) agenda. The learning activities of U3As should be directed to aid older adults gain power over their lives. Education must not be viewed as “merely helpful,” as a commodity that via the medium of a lecture anybody may acquire (Fischman, 2009). Rather, it should produce a sense of control, acting as a catalyst for individual and social empowerment. However, there is no need to reinvent the wheel. A transformative agenda may well be coupled with a functionalist rationale, especially with respect to learning programs on health prevention and management. As Jackson (2006) points out, the connections between bodily experience, emotion, learning, and cognition differ according to gender, age, and other differences. Health issues in later life can never be understood outside of social, cultural, and collective experiences. Indeed, research finds that active involvement of older people in their own health care through group counseling and the use of problem-solving skills contributes to higher levels of empowerment in later life (Beckingham & Watt, 1995; Ma & Chi, 1995). One key avenue for the coupling of transformative and functionalist agendas is undoubtedly “health literacy”—that is, “the degree to which individuals have the capacity to obtain, process, and understand basic health information and services needed to make appropriate health decisions” (Ratzan & Parker, 2000, p. vi). Motivated by the concern that a large majority of older adults possess below fundamental levels of health literacy, the goal of health literacy programs is to combine educational and learning pathways in a way that lead to improve older persons’ abilities to access, understand, appraise, and communicate health information (Wister, Malloy-Weir, Rootman, & Desjardins, 2010). U3As

hold much potential in improving those characteristics that bring about sufficient levels of health literacy skills—namely, “predisposing characteristics” such as positive health beliefs, “enabling factors” such as participation in health prevention and management programs, and “need factors” such as the monitoring of body symptoms that motivate individuals to seek assistance or make behavioral changes (Andersen, 1995). A promising strategy for U3As would be to engage in a coordinated approach with seniors groups, libraries, health promotion agencies, and health care providers, to increase the access and uptake of resources that improve health literacy. Resources may range from e-learning to reading of books, magazines, and other health literature. Considering that there are many older adults facing barriers to take up such resources and that an improved health literacy has an immense potential for empowering, a transformational rationale fits well with a functionalist agenda for health literacy.

Widening participation. U3As should seek to dismantle those barriers that exclude older adults, other than middle-class White urban females, from seeking membership and participating in its activities. Learning opportunities must be made available in working-class communities, rural regions, personal homes, and “male sites” such as sports centres and pubs, so that membership becomes more representative of the older population. Learning coordinators must work to counter the *psychosocial* barriers that older adults face in becoming members, but especially, the stereotypical and ageist belief in the adage “I’m too old to learn.” Marketing is also important in this respect and educational bodies must ensure that brochures are printed in suitable typesets with no crammed formatting and that they are displayed in a wide variety of settings that older adults frequent. As far as U3As are concerned, it is also important that the term “university” in the title is downplayed and even referred to in a tongue-in-cheek manner so that, by implication, the U3A will generate less apprehension among potential members. In recent times, there has been renewed focus on the need to the absence of men in older adult learning—especially those with unemployed and/or manual-work backgrounds. Foremost in these kinds of studies is the team headed by Golding (2011) in Victoria, Australia, who note that while men may not embrace conventional formal learning contexts, they however participate quite enthusiastically in community organizations such as sporting clubs, volunteer fire, and emergency services or hobby clubs. Overwhelmingly, community activity-cum-learning organizations provided older men a place to meet new friends, keep healthy, give back to community and learn new skills and associate with other men (Golding, 2011). The significance of these studies is that older men are enticed to late-life learning when the right settings and curricula are in place.

Critical geragogy. U3As must escape the “pervasiveness of schooling” which operates through a top-down model of instruction and which cultivates respect for “universal” knowledge. Rather than embracing traditional models of education in which the students are the depositories and the teacher the depositor (Freire, 1970),

educators must embrace a critical geragogical practice that aids learners to perceive the social, political, and economic contradictions present in late modernity. This involves two key strategies. The first is to generate a liberating curriculum. This involves the immersion of educators within the learners' thematic universe to develop "generative themes" that are then codified into motifs that older learners can identify with. The second is to implement "dialogue" and "problem-posing" as the key strategies of teaching and learning. While "dialogue" demands the problematic conformation of that very knowledge in its unquestionable relationship with the concrete reality in which it is engendered, problem-posing involves a constant unveiling of reality and revolutionary futurity.

E-learning. U3As must emulate and improve the limited experiments in e-learning already underway in late-life learning (e.g., Hernández-Encuentra, Pousada, & Gómez-Zúñiga, 2009; Kim, 2008). These initiatives have demonstrated that, contrary to conventional wisdom, e-learning incorporates advantages that go beyond the potential of traditional classroom settings (such as providing learning opportunities to housebound and frail elders) and that emancipation and empowerment are not anathema to e-learning (see especially Swindell, 2000, 2002). In this respect, older adult education must put more effort to embed in their learning strategies in the web 2.0 revolution that now provides extremely user-friendly applications. Contrary to its predecessor, web 2.0 uses interactive tools—ranging from Blogs, Wikis, Podcasts, online journals, to virtual picture databases—which offer limitless possibilities for an interactive, empowering, and participatory forms of older adult education. Without doubt, e-learning is a key foundation on which to build good quality and empowering forms of informal learning.

Preretirement education. Transformative education in later life is also responsible to future cohorts of older persons. Foremost, there needs a drive to make society aware that the educational system that spends some 18 years, and substantial financial capital, to prepare citizens for the world of work, but simply a couple of afternoons (if lucky) to leave it, is clearly biased against older adults. Undoubtedly, society has an obligation towards its citizens to provide them with learning initiatives that help them plan for their third and fourth ages. Here, it is noteworthy that a "really" transformative preretirement education is not simply instruction about such formalities surrounding pensions, the drawing of wills, adequate housing, and health. It is one, however, which includes a discussion of psychological and social strategies that lead older adults to improve their quality of life. Most important, it includes a focus on the emotional issues of retirement ranging from the personal skills of self-awareness, self-regulation, and self-motivation, to the social skills of empathy and bond-building (Jarvis, 2001).

Intergenerational learning. A transformative rationale recognizes the empowering benefits of coordinating educational activities that link older adults with children,

teenagers, adults, and even much older peers. Intergenerational learning can be loosely understood as initiatives that increase cooperation, interaction, or exchange between any two generations, and which involve the sharing of skills, knowledge, and experience. Such learning fosters harmony among the generations by encouraging younger and older citizens to overcome any prejudices held towards each other (Newman & Hatton-Yeo, 2008). Other benefits include augmenting social capital, stimulating active citizenship and participation, promoting cross-generational working, sharing societal and professional resources among generations, challenging social problems cross-generationally, and supporting lifelong and life-wide learning (Thomas, 2009). Intergenerational learning activities may range from grandparent–grandchild learning programs to book clubs, community work, and film screenings for unrelated learners.

Fourth age learning. The learning needs and interests of frail people, including those living in residential/nursing homes, must be central to any transformative rationale. The link between mental fitness and good health is a slippery one and may never be unequivocally resolved. Yet, older people who continue to engage in cognitively stimulating activities have been found to be in a better position to adopt strategies assisting them to augment their well-being and independence (Jarvis, 2001). U3As are called on to

- provide learning opportunities for informal family carers of older persons to enable them focus on the dynamics of caring, empower the lifelong development of frail elders, and anticipating and recognizing the needs of the person under care.
- include outreach strategies—such as mobile library services, intergenerational linkages, and visiting learning bodies—that bring the learning experiences to the homes of housebound elders; and
- coordinate educational sessions in residential and nursing care homes so that all older persons, even those suffering from confusion or dementia, have an opportunity to participate in third-age learning opportunities.³

Conclusion

The purpose of this article was to conduct a critical analysis of U3As with the specific purpose of advancing a transformative rationale for education in later life. While the positive functions of U3As cannot be put in doubt, empirical research locates a dark side to this movement. In certain circumstances, U3As actually serve to advance the interests of dominant sectors of older adults—especially those with high volumes of cultural, financial, and physical capital—at the expense of subaltern and more vulnerable peers. The article also proposed key proposals for older adult education as possible ways forward in establishing a transformative educational practice in later life.

One foreseen criticism at this point is from fellow colleagues who tend to avoid unitary subjects and grand narratives, as well as undermine the limits of the

enlightenment project. It is claimed that transformative education runs the risk of substituting a partial view of human experience since emancipation may itself become a new form of oppression, a new kind of ideological constraint. However, this well-rehearsed criticism is strictly misguided. Transformative education never follows a “top-bottom” approach, rejects both authoritarian and laissez-faire practices, and is ultimately the result of a democratic learning practice between teachers and learners. For transformative education to be successful in later life, teachers must first immerse themselves in the worldview of older adults, and consequently, negotiate with learners the curriculum and goals of the learning process. The persistence of structures of oppression—in terms of class, gender, age race, ethnicity, sexuality, and ability/disability—are there for all to see, and sometimes even experienced on a personal basis. In transformative education, the main task is not to liberate others at all costs through international recipes but to develop solidarity with each other. In Freire’s words,

I like being human because I know that my passing through the world is not predetermined, preestablished. That my destiny is not given but something that needs to be constructed and for which I must assume responsibility. I like being human because *I am involved with others* in making history out of possibility, not simply resigned to a fatalistic stagnation. (Freire, 1999, p. 54—italics added)

In conclusion, there is no doubt that achieving transformative education in later life will not be easy and will be fraught with various difficulties. One obstacle is that, while there is much potential for older adults to effect social change, this is counterbalanced by “internal ageism”—that is, a devaluation of being “old” by older adults themselves. In postindustrial societies, it is the glorification of youth, as exemplified in public advertising, which has ideological dominance. To be “old” is to be “other,” to be “different” (Findsen, 2007). Indeed, the first challenge of transformative educators is to work together with older learners to unmask this hegemony, a hegemony that has made antiaging medicine and social services multimillion dollar industries. Unless this is overcome, it is futile to expect older adults to engage in transformative education because, for all intents and purposes, they will not see themselves as older persons. This was, in fact, what made the term “third age” such a successful discourse in both academic and popular circles since it functioned to liberate young-old persons from the subjective fetters associated with being “old.” Unfortunately, such shackles were not been obliterated but simply transferred to more vulnerable peers, those who experience financial, physical, and mental difficulties relatively early in the second half of the life course, and especially, the old-old. All this points to the pressing need for a renewed commitment to social justice and fairness, by all possible means, towards the establishment of more equitable alternatives. I sincerely believe that transformative education is a step in the right direction to start dismantling those oppressive and discriminatory conditions that serve to dehumanize older adults. Transformative education, in Freire’s (1998)

words, is a “pedagogy of hope” for both the present and incoming generations of older adults.

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Notes

1. Housden (2007) presents various case studies of good practice in educational initiatives with older adults with limited physical capital. Three key contributory factors are highlighted—namely, (a) providing new interests to a sector of population who tend to approach their daily lives by sitting back and “waiting to die,” (b) a distraction from the pain and anxiety generated by illness or disability, and (c) providing information about specific illness and health in general.
2. These principles are not exclusive to older learners since to separate older adults completely from middle-aged learners is tantamount to ageist practice. The principles should be viewed as more of a gerontological fine-tuning of transformative education for “adults” than anything else. Indeed, keeping in mind the psychological, socioeconomic, and bodily transformations that characterize later life, it would be naive to assume that facilitators should approach transformative education with older adults without taking consideration their unique position in the life course.
3. It must be recognized that learning opportunities with frail persons experiencing mental and intellectual challenges such as dementia and Alzheimer’s is not without difficulties such as dementia and Alzheimer’s. It also necessitates adherence to strict ethical guidelines. However, U3As are encouraged not to lose hope and coordinate learning initiatives under the supervision and guidance of learning therapists who generally are members of some paramedical profession who have undergone specialist training in the lifelong and experiential nature of learning, the basic issues in creating a supportive learning environment for older people, and an understanding of the dialectics of learning therapy and professional care.

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Bio

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