RESEARCH ON THE EDUCATION AND LEARNING OF ADULTS

Learning across Generations in Europe

Contemporary Issues in Older Adult
Education

Bernhard Schmidt-Hertha, Sabina Jelenc Krašovec,
and Marvin Formosa (Eds.)

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ESREA

European Society for Research on the Education of Adults

Learning across Generations in Europe

Contemporary Issues in Older Adult Education

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ESMERALDINA VELOSO & PAULA GUIMARÃES

4. EDUCATION AND EMPOWERMENT IN LATER LIFE

INTRODUCTION

In recent times, adult education has witnessed an increasing number of activities aimed at older adults (Findsen & Formosa, 2011). From social and cultural programmes, to literacy and local development projects, older adult education has become a major issue in policy making. One locates guidelines emanating from international bodies ranging from the European Union (European Commission, 2006, 2007) to the United Nations (2002), that advocate public and non-governmental organisations to implement social policies and leisure projects that relate to learning and which target older adults. Such policy trends have been discussed by a number of authors, such as Findsen (2005), using various theoretical and analytical approaches. One key standpoint is the functionalist perspective which celebrates the concepts inherent in activity theory above other visions, and which supports the adoption of functionalist rationales directed at older adults (McClusky, 1974). Policies following such a vein of thought argue that adults have to avoid decline in later life. Even if older adults adopt activities that are similar to those followed in midlife, such actions are nonetheless regarded as beneficial for retired people. A key counterpart to such a position is the critical perspective which perceives the empowerment of individuals and emancipation of social groups as extremely relevant to the theory and practice of older adult education (Formosa, 2000). This critical perspective, based on the tenets of radical theory, aims to change the ways that older adults' life conditions are fostered, and favours a real transformation of peoples' lives by democratizing access to, and participation in, education (Glendenning & Battersby, 1990; Glendenning, 2000). In other words, it supports a kind of education for older adults which promotes individual emancipation and social empowerment as part of the learning process. It is in the context of critical educational gerontology that older adult education results in furthering the available opportunities for social participation and active citizenship.

ADULT EDUCATION

Several authors have theorised and researched adult education. Contingent on the assumption of high diversity in adult education and within the framework of education practice, Canário (1999) discussed possible activities and, in particular,

its goals, objectives and target audiences, as well as the qualities and skills that educators or trainers involved in older adult education should possess. Canário singled out several foci for intervention – including formal primary education, continuous vocational training, local development and socio-cultural programmes – and also highlighted the relationship between adult education and the life course experience. Similarly, Foley (2004) focused particularly on the various dimensions of adult learning, and drew a distinction between formal education, non-formal education, informal learning, and incidental learning, albeit also highlighting the limits of such fields of practice. Furthermore, apart from the traditional areas of education intervention – that is, basic education, university education, vocational training and community education – Foley (*ibid.*) highlighted other emerging fields of intervention that have generated ‘distinctive forms of education’. Such forms include those targeted at specific adult groups such as older persons, and which are supported by organizations promoting late-life learning, most especially, the University of the Third Age.

Adult education has been analysed through several theoretical frameworks. Finger and Asún (2001), for example, identified pragmatism, humanism and Marxist adult education and other analytical perspective on the basis of the importance given to individual empowerment and the social emancipation of groups in the context of critical pedagogy. All these viewpoints are key concepts in the field of adult education, revealing different traditions since the Enlightenment that are each intertwined to the notions of freedom and autonomy. Freire (2005) also discussed the concepts of empowerment and social emancipation as part of the analysis of oppressive structures, practices and theories. He argues that adult education activities should be based on problematization and directed towards raising the subjects’ awareness of oppressive power relations between different social agents. Hence, the attention in Freire’s (*ibid.*) work was focused on the importance of accepting emancipation as a point of departure, rather than an outcome of education, one that involves the continuous reflection and dialogue between both learners and teachers.

The education of older adults emerged rather recently as a field of inquiry within adult education. The topics that can be singled out from the literature are varied and include the wisdom of older adults (Jarvis, 2012), community and intergenerational learning (Boström, 2012), the role of state and non-governmental organizations (e.g. Elderhostels and Universities of the Third Age) in promoting education for senior citizens (Velooso, 2007; Formosa, 2014), the significance of learning for older individuals (Hake, 2012), and the various teaching-learning models for older persons such as geragogy and gerontagogy (Berdes et al., 1992; Lemieux & Martinez, 2000; Formosa, 2002, 2012). The goals of the education of older adults remain entrenched in a quest to arrive at rather more consistent definitions of important concepts for this field of study, and to identify thematic and relevant methodological issues. Although this area has gained from relevant and recent contributions, it is also true that the field is still struggling to establish itself as a discipline, mostly because the definitions of older adults, later life and

ageing adopted by researchers are highly diverse, as indeed, are the posited methodological approaches (Veloso et al., 2011; Krasovec & Radovan, 2012).

FROM EDUCATIONAL GERONTOLOGY ...

Throughout history older persons were generally left out in the cold as far as educational opportunities are concerned (Boulton-Lewis & Tam, 2011; Findsen & Formosa, 2011). However, the goal posts changed dramatically with the coming of the third age (Weiss & Bass, 2002). As an increasing number of older persons experience a smooth material and financial transition from working life to retirement, attention is directed towards their post-materialist resources – especially, identity capital, human capital, and social capital (McNair, 2009). First, the coupling of a second modernity with a third age lifestyle makes older people experience ‘ontological insecurity’ which tears down their established ‘midlife’ identity usually based upon occupational and familial experiences. In such events, older persons are quick to take advantage of learning opportunities to develop and maintain a ‘new’ sense of identity, self confidence, control over their lives, and civic engagement with other people. Second, education becomes instrumental in developing the skills and knowledge needed to find and retain sustainable and satisfying employment, both paid and unpaid. This has become increasingly complex due to the rapidly changing labour market and the expansion of the numbers of people in the third age, so that the rising number of third agers engaging in re-skilling vocational courses comes as no surprise. Finally, as people become older they experience a decline in their levels of social capital since children are becoming more geographically mobile and as members of their social network relocate to retirement communities, enter residential/nursing homes, or pass away. Education and learning activities are thus increasingly viewed as efficient strategies to make new friends, acquaintances and possible partners, as well as reinforcing existing relationships.

The above factors were all of key importance in turning the attention of academics in both adult education and gerontology towards the field of ‘educational gerontology’. According to Glendenning (1985), the term educational gerontology was first used at the University of Michigan as the title of a Doctoral programme promoted by a Professor of Education, Howard Y. McClusky. This programme “was crucial in embedding older adult learning in an academic context” (Findsen & Formosa, 2011: 52), and focused mainly on that interface between education and older adults (Withnall, 2002). Educational gerontology was eventually defined by Peterson (1990) as a field of study and practice for older adults and ageing, with the relation between these two areas characterizing older adult education, whilst at the same time constituting a sub-field of these two fields. Peterson (ibid.) included three main areas within educational gerontology: education for senior citizens, training of professionals to work with this group and training for other groups about senior citizens and ageing. Over the years, this definition of educational gerontology has been reshaped, especially by Glendenning (1990, 2000), who put forward two key aspects of educational

gerontology – namely, older adult education on one hand and gerontological education that focuses on the teaching of gerontology to professionals working in the field of ageing on the other.

However, the concept of educational gerontology remains unambiguous since there have been other definitions and divisions. In this respect, the research and reflection by Findsen and Formosa (2011) on the use of the terms ‘educational gerontology’ is noteworthy. According to these authors, both terms “have lost their momentum as definitional terms” (ibid.: 54). Indeed, Findsen and Formosa examined various issues of the journal *Educational Gerontology* and found that in many articles the term ‘educational gerontology’ was used to refer to the teaching of studies on ageing linked to undergraduate and graduate courses, targeting especially allied health professionals and para-professionals. This situation was found to be just as common in other books and articles, with Findsen and Formosa concluding that although educational gerontology was not used to denote the education of older adults as such, different authors resorted to a variety of terms to discuss this field. Another important finding was that most of the authors writing in *Educational Gerontology* were not gerontologists: “that the past two decades witnessed ‘educational gerontology’ moving away from academic gerontology and positioning itself more within the fields of adult and lifelong learning” (ibid.: 55).

... TO CRITICAL EDUCATIONAL GERONTOLOGY

One theory that had a major influence on the field of educational gerontology was Havighurst’s (1954) functionalist theory of activity, which addressed the problem of role changes with the alteration of activity in later life (Veloso, 2011). Following retirement, different situations may occur in older adults’ social roles, with some roles becoming more intense and others less so. New roles may even emerge in areas such as recreation, family affairs and religious activities. Following this line of thought, the development of different educational and learning activities and, simultaneously, the roles performed by older adults, lead to a greater feeling of happiness and adaptation to the challenges brought on by later life.

The above standpoint has attracted considerable criticism, particularly from authors in the field of educational gerontology. Glendenning and Battersby (1990) argued that the education of older adults was based on erroneous assumptions promoted by the functionalist paradigm, and that the paradigm had to be changed. They note that this theory is wrongly based on the assumption that older adults constitute a homogenous group. In the educational field, this is expressed in educational programmes that particularly target older adults from the middle classes, with their interests being reflected in the curriculum. Glendenning and Battersby (ibid.) also emphasized the need to question what has been done for the education of older adults, not only to allow wider participation access, but also to prevent their marginalization in society. All the criticism that these authors levelled at activity theory demonstrated a strong shift from the functionalist to the socio-political paradigm. This shift helps practitioners and theorists in older adult education to understand how many older adults are marginalized in society, and to

question educational practices by arguing in favour of a 'liberating education' that promotes social empowerment, emancipation and transformation – a position which is based on the educational philosophy of Freire (2005). In critical educational gerontology, social change is expressed through the awareness of social inequalities that learner's experience and which lead to their marginalization. A conception of dialogic education is thus required to drive social change, as it has the potential to enable a relationship between knowledgeable subjects and the world. Hence, overcoming the hegemonical relationship that results from 'banking education', a 'top-bottom' teaching process where learners are simply considered as the depositaries of knowledge dispensed by expert teachers.

The foundations of a liberating education presuppose a dialogical education which implies changing the way teaching is done. As Freire (2005: 47) underlines, "knowing how to teach is not transferring knowledge but creating the possibility for its actual production or construction". The teacher has to have listening skills to create the conditions for knowledge creation. This means that, whoever "talks and never listens; whoever 'carries' knowledge and gives it to students ... has nothing to do with liberation or democracy ... whoever acts and thinks this way, deliberately or not, helps to preserve authoritarian structures" (Freire, 2000: 26). Formosa (2005, 2007, 2010a) is a key supporter of this standpoint and wrote extensively on critical educational gerontology. Very pertinently, he draws attention to the need for and relevance of transformative education for senior citizens that offers empowerment and emancipation. In Formosa's words (2010b: 9), "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 changing it". Inspired by Freire's (1972) philosophy of education, the authors put forward four major principles for a critical epistemology in late-life education (Glendenning & Battersby, 1990: *passim*):

- an exploration of how the relationship between capitalism and ageing influences the concept and practice of education in later life
- a critique of the dominant liberal tradition that involves a negation that education for older persons is essentially a neutral uncontested enterprise
- the inclusion of concepts such as emancipation, empowerment, transformation, social and hegemonical control and what Freire calls 'conscientisation'
- developing 'the notion of praxis' to establish a 'critical gerogogy' which leads older people to greater control over their own knowledge and thoughts.

More recently, Formosa (2011: *passim*) proposed a contemporary set of principles for critical educational gerontology:

A transformative rationale. Critical educational gerontology is afraid with 'how' and 'what we are producing, who it benefits, and who it hurts'. It not only aims to dissect the realities surrounding us but also to enable learners to imagine and work together towards the realisation of a social world than is governed by life-centred values rather than the ideology of the market. A critical pedagogy 'reject[s] a

fatalistic or pessimistic understanding of history with a belief that what happens is what should happen' (Freire, 2002: x).

Educators yes, facilitators no! Contrary to a common misconception that critical pedagogy is 'non-directive' and a 'dialogue of equals', in CEG the educator and learner are not on an equal footing. Whilst Freire (1985: 177) recognises that teachers 'have to learn from our students', he also underlines that 'at the moment the teacher begins the dialogue, he or she knows a great deal, first in terms of knowledge and second in terms of the horizon that he or she want to get to' (in Shor & Freire 1987, 103).

Critical geragogy. Geragogical prerequisites for critical educational gerontology also include listening, love and tolerance. Whilst it is only as a result of listening that one can overcome 'narration sickness' which makes us talk past each other rather than to each other, a geragogy of love embraces and cherishes the hope that we could exist as full human beings, having the freedom to live passionately with an 'increasing solidarity between the mind and the hands' (Freire, 1997: 33).

Revolutionary praxis. Critical educational gerontology entails a critical engagement with historically accumulated concepts and practices – that is, a 'reflection and action upon the world in order to transform it' (Freire, 1972: 52). Humanisation is only achieved through intentional, reflective, meaningful activity situated within dynamic historical and cultural contexts that at the same time shape and set limits on that activity. In critical educational gerontology both teachers and learners need to extend their work outside the educational setting, and connect with what is going on in the public sphere.

As to be expected, critical educational gerontology has also been open to numerous reservations. One early critical exposition of critical educational gerontology is found in Percy's (1990) work which argued that older persons are in reality a highly heterogeneous group so that it is fallacious to generalize this social grouping as 'disadvantaged' or 'disempowered' situations. Assessing the objectives of critical educational gerontology as stated by Glendenning and Battersby (1990) – which above else noted increasing the awareness of older adults about their rights and the need for improved levels of active citizenship, and older adults should have control over their thinking and even gain power over their lives – Percy (1990) noted that despite many older people lack all or some of money, health, security, and social contact – later life is still marked by extensive heterogeneity so that many elders are actually positioned in advantageous positions. The objectives of critical educational gerontology are therefore perceived by Percy as too 'dubious', 'comprehensive', and 'wide-ranging', to be successfully tackled by educational classes attended by a very minute percentage of older adults. Inspired by the humanist emphasis on the 'freedom to learn' and 'self-actualisation', he argued that learning:

... is essentially a matter of personal quest. Learners begin from where they are; they follow the thrust of their own curiosities in order to make what is

around them more meaningful; ideally they should be free of external constraints so that they can learn until they are satisfied, until they have achieved the potential that is within them. (Percy, 1990: 236)

Percy advocates a humanist standpoint for educational gerontology where both the education goals and the learning of the older adults are similar to those of a person of any age in the sense that education should provide each individual, regardless of age, an opportunity for self-development. To cite Percy (*ibid.*: 236): “to be fully human, to exploit the potential to being alive, this perspective implies, one has to be continuously a learner and the proper society would make this possible”. Regarding the interests served by education, Percy argued that it is the interests of everyone, and older people in particular, that should be promoted. This is achieved by upholding the goal that he sees to be at the centre of older adult education – namely, self-fulfilment – since “our society would be a better society if the educational potential of older people were to be fully used” (*ibid.*: 239). In counteraction, critics of the humanist standpoint stress upon the difficulty to consider human beings as free, as having an inner goodness, seeking self-development and, in favourable circumstances, managing to achieve their potential (Finger & Asún, 2001). In light of this, Formosa (2011: 322) explained how the premises of humanist adult education are ill-founded: “unfortunately, such premises are situated in a social vacuum, entrenched in therapeutic and individualist approaches to personal development, and assume that a disparate group of self-actualised individuals lead automatically to an improved society”. Furthermore, he pointed out that the humanistic perspective does not give due weight to the influence of socio-historical, political and economic conditions on human life. This implies that, contrary to Percy’s (1990) claims, older adults are not entirely free to follow their own interests, but “are constrained by the persistence of lifelong positions in repressive locations in terms of class, gender, race, ethnicity, sexuality, and, especially in our case, acts” (*ibid.*: 322).

More recent criticisms towards critical educational gerontology is found in Withnall’s (2000, 2002) writings where albeit agreeing that educational gerontology needs a new paradigm to enable it to answer important questions related to education in later life, she also argued that critical educational gerontology is not the answer. This is because despite critical theory’s interest in exposing distortions and constraints, it also runs the risk of providing a partial and somewhat distorted view of human experience, and thus, the construction of emancipation and empowerment can become oppressive. Another issue put forward by Withnall (2010) was that critical educational gerontology leaves no room for expressive education for older adults; since it advocates an emancipatory education that has an *a priori* goal, it ultimately functions to emphasize an instrumental type of education. Withnall (*ibid.*) also highlighted other definite limits that characterise the critical perspective. For example, it cannot explain the importance of activities fostered by the Elderhostel movement in the United States, or of education groups for older adults organized in England, which often operate without guidance. Withnall (*ibid.*: 95) thinks that this is the case because

“participants in these types of activities certainly could not be described as older people trying to understand why they are marginalised”. At the same time, she has also pointed out that the fact that older adults are all too often viewed by critical educators as having no power might not correspond well to reality since learners might have power in other social contexts. Hence, she concluded, a reference to people without power is a generalized statement which may not correspond to the facts. Withnall (2010: 116) therefore 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’. This is possible, in her view, if learning is perceived as a 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.

Within this debate on gerontology, Formosa (2002, 2012) has stood out by defending critical gerontology and at the same time having developed an analysis that advocates the renewal the field of educational gerontology and demonstrate its current relevance. Indeed, throughout his work Formosa assumes that critical educational gerontology needs to be renovated since it appeared more than two decades ago in a context of modern capitalism in which social inequality was based on social class and social policy on ageing was more or less solely preoccupied with securing an adequate retirement pension for older persons. At present, as Formosa (2011) underlined, we are living in the time of late modernity, which created flexible forms of organization and finished with neo-corporatist relations between the state and labour. Given such a backdrop of changing reality, critical gerontology should be renewed so that it “rediscovers its liberatory spark in an excessively globalised and individualised world” (ibid.: 317). To accomplish this goal he makes four key proposals in the hope that critical educational gerontology “engage[s] more extensively in overturning the numerous chimeras that currently pass as justice, freedom, autonomy, and democracy” (ibid.: 326). The key proposals included “a transformative rationale that challenges the cultural hegemony of neoliberalism, the centrality of directive educators, embedding geragogy in a critical epistemology, and a praxeological engagement with historically accumulated concepts and practices” (ibid.: 317).

CONCLUSION

Adult education encompasses a wide range of practices and the discussion of concepts such as individual empowerment and social emancipation is extremely relevant to the field. Indeed, education is not a neutral activity (Freire, 2000), and hence it is necessary to make a stand as regards its values and goals. Critical gerontology, as endorsed by Glendenning and Battersby (1990) and Formosa (2012), aims precisely for the empowerment and emancipation of older adults within the framework of a liberating education. In a world where older adults are affected by a different range of social inequalities, it is increasingly clear that education must allow a critical and radical pathway. Whilst some limitations of

critical educational gerontology have to acknowledged, the potential of this field is not to be underestimated, especially in view of the coming of new forms of social inequality in later life. As Cusack (2000) argued, the marginalization of older adults is starting to be conceived and seen not only in terms of social class and economic, cultural and social factors, but also in terms of the marginalization that retired individuals may experience by being retired, by being of a certain age, and being excluded from the sphere of economic production. Indeed, older learners are the target of age discrimination and prejudices (ageism), as they are labelled with stereotypical images to the extent that the negotiation of people' identity grow more difficult with age. Critical trends in late-life learning may thus continue to mitigate against such forms of injustices, not forgetting, however, that critical educational gerontology "will be continuously a work-in-process, and there is still much work to be done" (Formosa, 2011: 327).

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