Final Report to the CAUCE Research Fund - *Older Adult Education (OAE) at Canadian Universities*

Introduction

Over the last 40-50 years, there has been a growth in programs offered by educational institutions targeted to older adults (OA); programs often referred to as university of the third age (U3A). Formosa (2014, 2010) and Swindell and Thompson (1995) looked at the development of universities of the third age across a number of countries. Formosa (2014) claimed that U3As "have become the most successful educational institutions engaged in later-life learning" (p. 42). The connection of U3As to traditional universities varies from a direct connection in France where universities have been obliged to provide lifelong education since the late 1960s to Britain where U3As, for the most part, operate independently from formal institutions on a "self-help approach based on the principle of reciprocity, of mutual giving and taking" (p.45). Formosa (2014) further noted that the U3A movement has spread worldwide to include more than 60 countries with models of practice that follow either the French or British models or form hybrids incorporating elements of the two. The reference made to Canada is about French-speaking U3As in Quebec that Formosa indicated are part of traditional universities. The current study more specifically looked at university-based older adult (55+) education in Canada, which overall appears to be a hybrid of the original British and French U3A models. In addition, to asking what, how and why about OAE practice, the project examined the positioning of older adult education within universities. The research questions were: How is OAE practiced in Canadian universities? Why do Canadian universities offer educational programs for older adults? What challenges face Canadian universities in sustaining /developing OAE programs?

Description of Methodology

The portal to Canadian universities was continuing education units that were members of the Canadian Association of University Education (CAUCE). Typically, educational programs for audiences such as older adults are offered through continuing education as part of their mandate of community outreach. Assuming all Canadian universities may not be members of CAUCE, universities who were members of the U15 group, but not members of CAUCE, were included in the sample. The U15 is a group of leading Canadian research universities that work together to lead long-term research studies, leverage knowledge through partnerships, and foster innovation. As well, a Google search was conducted using key words - *senior, older adult, elder* along with the words *university* and *education* in an effort to identify other Canadian universities that were not CAUCE or U15 members that had programs targeted to OA.

Once the universities were identified as potential participants in the study, a multi-stage data collection approach was used, including web search, short survey, long survey, and in-depth interviews. A total of 50 universities were identified as participants in the study, and were sent the short survey asking whether they offered programs targeted to OA and to identify an informed contact person. Thirty-four (34) replies were received (68% response) of which 18 (36%) indicated offering programs targeted at OA. The designated contact person at each university was sent the long survey using *FluidSurveys.* All eighteen selected universities (100%) responded to the long survey. Subsequently, in-depth interviews were set up through the designated contact person at the selected universities; interviews were conducted in person and/or by teleconference. Where opportunities were available, the researcher attended scheduled classes. For purposes of reference, multiple interviews were conducted at two universities outside of Canada that offered significant educational programming for older adults, University of California at Los Angeles (Osher Lifelong Learning Institute), and the University of Strathclyde in the U.K.

Literature Review (in progress)

In Canada, the aging of the population will increase over the next several decades, particularly as more Baby Boomers move into their 60s. Between 2005 and 2036, the number of older adults will increase from 4.2 to 9.8 million, and the older adults' share of the population will almost double increasing from 13.2% to 24.5% (Turcotte & Schellenberg, 2007).

Retirement, as an active phase of life, is a fairly new concept, having only come into existence in the 20th Century. In the past, retirement was often seen as synonymous with the gradual cessation of any and all activities and was characterized by illness, disability, a burden for caregivers and society, and a cost to taxpayers. In contrast to this view, today's older adults are significantly different from those of several decades ago. Older adults live longer, obtain higher levels of education, seek opportunities to travel, maintain careers, and have interests and social networks (Novak & Campbell, 2001). Successful (active) aging, characterized by minimal or no decline in function, is an achievable goal for many older adults. More recent thinking on creative retirement for older adults has considered the phenomenon of a large, basically active group of older adults who, on retiring from the workforce, want creative challenges, intellectual stimulation, pleasure in learning, master of new skills, control of their learning, and the ability and opportunity to contribute to their community (AARP survey on lifelong learning, 2000; Thompson and Foth, 2002). Withnall (2002) suggested older people enjoy learning, welcome more informal learning methods, get intellectual stimulation from learning, cope better with constant societal change as a result of learning, and enjoy better health when they are stimulated by continued learning. Istance (2015) argued that education for older adults is as important as early childhood education because it is critical to active aging, which benefits older adults as individuals and the societies in which they live. Others such as Menec (2003), and Menec and Chipperfield (1997) made more direct links between active older adult lifestyles and healthy aging and wellbeing, and Merriam and Kee (2014) pointed out that participation in learning by older adults adds to community wellbeing because of the contribution of life experience, expertise, and service of engaged OA.

As well, older adults deal with role changes with increased leisure time after retirement, change in housing requirements, death of a spouse/ partner, and reduced finances (Imel, 2003). For some, retirement provides new employment opportunities, either in new paid careers or in volunteer work. These multiple factors can motivate OA to participate in educational activities that can positively support this transitional process, as well as contribute to a good quality of life through physical, mental, and/or emotional health and personal satisfaction in later life (AARP Survey on Lifelong Learning, 2000; Glendenning, 2001; Novak & Campbell, 2001; Thompson & Foth, 2002; Withnall, 2002)—that is, a sense of successful aging (Strawbridge & Wallhagen, 2003).

Summary of Findings and Discussion

<u>Development of OAE at Canadian universities</u>

Ninety-three percent (93%) of respondents indicated the development of OAE programs has been encouraged by their universities. Respondents ranked the top three reasons that their universities offer OAE programs: to serve the growing population of OA, to fulfill the mandate of continuing education, and to satisfy a commitment of the university to community engagement. Because OAE programs are connected to continuing education units, these units were specifically and practically supportive of OAE programming; beginning with continuing education deans/directors. This support was strongest and longest-lasting when deans/directors view OAE programming from a community engagement/community service perspective versus a program specific, revenue-cost perspective. Regardless of the strength of commitment of a particular dean/director, OAE programs readily fit the

outreach mandate of continuing education units; particularly fit the often espoused commitment to lifelong learning.

From a practical perspective, the commitment of continuing education units ranged across a number of functions and services. For those programs embedded in continuing education, the OAE programs were fully supported like any program in continuing education, including financial support to pay for overhead and administrative expenses that were not covered by program revenues. For affiliated programs, where a partner organization assumed some of the functionality of the program, the supports from continuing education fluctuated. At a bare minimum, classroom space was provided, but more often the services and supports were expanded to include technology support, marketing design and production, financial and registration services, and office space. Regardless of supports provided, key to the success of OAE programs, particularly affiliated programs, was the university brand. Branding OAE programs distinguished them from community-based OA programs in terms of quality, academic substance, and value.

Encouragement and support from the university beyond that provided by continuing education was more difficult to detect. Many respondents talked about the university's strategic commitment to community engagement, and OAE was one of the ways to meet this commitment by extending university resources into the community. While this is true, it does not necessarily indicate an awareness of OAE programs within the university. Most respondents indicated the university president would be aware of the programs, and in a few instances suggested they would be acutely aware of the programs. While the level of awareness differs, it was clear that should existing programs be discontinued or drastically modified, the president's office would become involved because of the push back from OA learners. More tangible support across universities for OAE programs is from faculty members who regularly teach in the programs, and, in some cases, teach voluntarily.

OAE practice in Canadian universities

OAE programs at the eighteen Canadian universities studied were primarily offered through continuing education units, but other units also offered programs for OA learners such as alumni associations and academic departments (e.g., kinesiology and recreation offer courses in active living and wellness). Most programs were long standing with some originating over 40 years ago. There were multiple reasons for creation of these programs – available funding as was the case in the province of British Columbia in the 1990s, individual champions within the university, and interest/pressure from the community. The administration of OAE programs can be described as either fully operational within continuing education or affiliated whereby a partner organization works with the university to design and deliver the program, which suggests a hybrid model as noted earlier. The partnership arrangements can be viewed as an affiliation continuum with programs characterized by shared operational functions referred to as highly affiliated at one end, and those where functions were more fully devolved to partner organizations as having low/little affiliation with the university at the other end.

The demographic characteristics of participants were as expected for educational programs targeted to older adults – an average age of 69, at least 70% retired, and more women participated than men (70-80% women). Those who participated were active learners with almost 90% taking between 2 to 4 courses each year with just over 50% taking 3 or more courses in a year. While OA participated for a number of reasons, based on Houle's (1961) motivation to participate typology, well over 80% of responding universities ranked *learn for the sake of learning* highest as the reason OA take courses, with *socializing with others* ranked second by 70% of respondents. At the same time, OA were said to

experience barriers to participation that respondents ranked as insufficient time, limited money, physical disability, and lack of transportation.

Respondents admitted that educational programs for older adults do not attract very diverse participation when described in terms of visible minorities, socio-economic status, and education level. In a few cases efforts had been made to address the issue through community-based programming. For example, the University of Regina's Lifelong Learning Centre engages in two programs, *Aboriginal Grandmothers Caring for Grandchildren Support Network,* and *Intercultural Grandmothers Uniting,* that are outreach initiatives designed to connect older women in the community who may not otherwise participate.

The OAE topics and types of courses offered by responding Canadian universities were academically-oriented non-degree courses. Traditional lecture-style delivery was most popular, but seminar-style discussion formats were common as well. There were virtually no online courses offered in OAE programs in the study. Courses offered varied in length with short (less than one-day) courses offered by about 45% of responding universities, one-day courses were offered by almost 40%, and 25% offered courses of 2, 3 or 5 days in length. Just over one-third of responding universities offered longer, term-length courses of 5-10 weeks. While there is an opportunity at some universities to attain a credential for courses completed, for the most part courses have no assignments, no tests or examinations, and no grades.

OAE programs employ a range of qualified individuals to teach. All universities reported attracting university faculty to teach, including full-time faculty, sessional instructors, graduate students, and retired faculty. Another popular cadre of instructors was community-based experts; with older adult volunteers a third source of instruction. The proportion of faculty teaching ranged from as high as 95% to as low as 20% of total instructors. OA volunteers typically teach in peer-lead courses, where their role is informed leader versus content expert. Most universities paid instructors teaching in OAE programs, although it was not uncommon for instructors to work as volunteers, particularly for peer-lead courses.

Challenges and future considerations of OAE at Canadian universities

OAE is alive and well at many Canadian universities with a good number of long-standing programs in place. These OAE programs began for different reasons, sometimes because of available funding as was the case in British Columbia in the 1990s, and in other cases because of a commitment of people, either a champion within the university or people advocating on behalf of an interested community group. Programs have changed over time – growing in size, reforming organizationally within/with universities, and, in some cases disappearing. Most noticeably, the fit of OAE programs within universities has changed, particularly as continuing education units experienced budgetary and financial pressures that often resulted in structural changes, with some universities disbanding their continued education units. The effect has been twofold: university-based OAE programs have become more independent of universities and offered by community organizations in various affiliated arrangements; and OAE programs have been blended with non-age defined, community/public programs. In both actions, the intent was to reduce costs either by shifting operational functions to affiliated community organizations or by combining efforts to create internal resource efficiencies.

About 60% (11) of the responding universities fully operated the OAE program within continuing education; with almost half of those (5) offering non-age designated programs that were promoted to OA. The other seven universities offered OAE programs in affiliation with community organizations.

Within both models, the supports, functions, and services provided by the university varied. Of the seven universities with affiliated arrangements, five had, what might be termed, "arms-length" partnerships, whereby partner organizations had increasingly become more responsible for multiple functions of program design and delivery, making them even more important to sustaining OAE programs. This devolution of responsibilities had resulted because of budgetary changes and the resulting pressures on the cost recovery financial models in continuing education, which suggested changes in affiliation arrangements were not strategic but circumstantial. The preference would be the former, particularly in light of the opportunity for universities to engage and serve this growing OA demographic. A recommendation supported by Ratsoy (2016) is for universities to consider the benefits of multiple approaches to OAE, particularly the benefits gained from partnerships with community-based learning organization. Related to this is the need for universities to consider alternative funding models for OAE programs that move away from the cost recovery models in place in continuing education. For example, OAE programs could be recognized as cost centers with operating costs (net operating costs) underwritten by the university or they could operate as service centers that are fully funded by the university. With such alternative forms of funding, the question still remains as where best to host OAE programs; arguably, they could remain in continuing education units with their mandates to extend university resources to the community and promote lifelong learning.

In addition to issues of organizational arrangements, universities need to consider the changing OA demographic, and answer the question - what should university-based OAE look like in the future? Along with the growing demographic of OA, there is a changing OA demographic in terms of health, education, technological savvy, and lifestyle. In other words, the current OAE programs were not necessarily designed for a new generation of OA. While there continues to be a high demand for courses, which suggests doing more of the same, will sustain growth, universities need to ponder how changing characteristics of older adults could impact OAE programs. For example, as more older adults become adopters of technology (Smith, 2014), online courses could be more attractive, specifically to those beyond traditional catchment areas, which, in turn, could reduce institutional and situational barriers to participation (Cross, 1981). Changing retirement patterns whereby OA either retire earlier or work longer could impact OAE programs. For those retiring earlier, courses and programs geared to later life changes and transitions could be of interest while for those delaying retirement, the schedule, as well as the content, could change to offer courses in evenings and on weekends, and courses to prepare for second and continuing careers. Closely connected to changing retirement patterns and vitality of young-old adults is the interest in pursuing studies that are new and completely different from their lifetime careers, i.e. picking up on latent interests, and, in some cases, acquiring credentials either in the form of certificates or degrees. As importantly, the diversity issue needs to be considered. As noted earlier, there is an obvious lack of participant diversity in reported OAE programs. In addition, to strengthening outreach efforts to underserved communities, universities need to heed the advice of Pejic (2008) and Delp and Rogers (2011) to get to know their surrounding communities and how to reach out to OA living in these communities. As well, universities need to be proactive in efforts to recruit OA participants from underserved communities, including finding topics and learning formats that will interest and engage them.

There is no question that the number of OA in the Canadian population is increasing, absolutely and proportionally (Turcotte & Schellenberg, 2007), and the benefit of education to the health and well-being of OA is evident (Menec, 2003; Merriam & Kee, 2014). It makes sense for universities to pay attention to this expanding demographic, but to meaningfully engage OA; universities need to embrace OAE unconditionally, rather than solely relying on the efforts of continuing education units operating under cost recovery budgets. Such an approach could have universities focus efforts to build and

connect with OA rather than simply developing courses. Learning communities can be created within the university and connections made with OA outside the university. The concept of a community of learners potentially exposes OA to a fuller range of university resources and opportunities, including opportunities to participate in research, work on outreach activities, attend talks, events, lectures, engage in intergenerational learning, and could go as far as to provide OA housing on campuses. Helpful to building this more comprehensive approach to serve OA is a university-wide mandate to engage OA. The Age-Friendly Campus Network, an initiative of Dublin City University in Ireland, is a good example of an overarching framework that would allow faculties, departments, and units to engage OA in the university, including providing education and learning opportunities. It moves the question of *do we serve OA?* to *how do we serve OA*? This type of commitment fits nicely with popular community engagement strategies in place at Canadian universities.

Dissemination of Results

- September 2016 - preliminary results (based on long survey data) were presented as part of a joint presentation with Walter Archer, University of Alberta, *The Ageing Population: An Impetus for Reform of the Community-Engaged University*, at the International Workshop on Higher Education Reform (HER) in Dublin, Ireland, September 7-9, 2016.
- Spring 2017 – submission of invited book chapter based on the HER presentation.
- Spring 2017 – final results to be presented to Extended Education Council, University of Manitoba
- May 24-26, 2017 – final results to be presented at the CAUCE Conference (accepted) in Vancouver, BC.
- Summer 2017 - paper based on the study to be submitted for publication to the JPCOE.

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