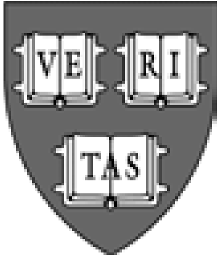

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THE AGE *EXPLOSION*: BABY BOOMERS AND BEYOND

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New Goals for Continuing Higher Education: The Older Learner

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February 10, 2003—it is the first day of spring classes. Twenty-six Harvard Institute for Learning in Retirement (HILR) members, aged 62 to 85 years, have enrolled in Anne Pirrera's course on Postmodernism. The 19 women and seven men are eager to explore the concept that has lately bedeviled fields such as art and architecture, aesthetics and culture, politics and feminism—areas in which many of them have labored with distinction in their lives and careers. Once a week for the 13 sessions of the semester, they come prepared for vigorous debate, having wrestled with one more demanding chapter in their assigned textbook.

Anne has offered courses on postmodernism and existentialism in the three years since she joined the Institute. Both have met with acclaim from her class members, and this current class has a waitlist of 17. Anne's career path did not entirely point her toward this undertaking. A retiree from 20 years in the insurance industry, she worked for John Hancock Financial Services as an employee counselor, a human resources director, and later, as a real estate investment officer. She earned her BA and MA from Catholic University in the 1960s, then attended the Sorbonne in Paris for a PhD in modern European philosophy. The sole direct experience she brings to being a study group leader at HILR is as a former teacher of management courses. Her life story and its rich complexity are not unusual among the 500 members of the Institute.

Now, as she begins, there are no empty seats in the room. While the class proceeds, Anne listens attentively, keeps the discussions focused, and with masterly, but never patronizing, command, offers clarifying perspectives on her challenging subject. This experience is repeated dozens of times a week all over the country at institutes for learning in retirement, in wide-ranging courses that include Russian literature, chaos theory, medieval music, Irish poetry, and evolutionary psychology. It is part of the brave new world of elder learning.

Education in the "third age" [is] a necessary component in the completion of the life cycle.

Psychologists like Carl Jung and Erik Erikson saw education in the "third age"[1] as a necessary component in the completion of the life cycle, a process of "self-discovery" by which elders blend newly acquired learning with their considerable life experience to achieve a sense of intellectual and spiritual resolution.[2] Alternatively, the process can be viewed as a form of dealing with "unfinished business," where retirees are free to indulge their interests in non-utilitarian subjects once career-related courses of study are behind them.

But not all older people will enjoy education as learning for learning's sake. Many will find themselves unable to afford retirement and will be forced to remain in the workforce taking courses of study for job retraining, such as English as a second language, computer science, management, or service-related skills, to strengthen their part-time or full-time employment eligibility. Others will seek engagement in civil society in the form of substantive volunteer work, utilizing, or learning to hone, former professional or avocational skills. As Marc Freedman relates in his book *Prime Time*, the baby boom retirees of the near future will not be content to assume the kinds of subservient roles previously reserved for "senior volunteers," but will likely demand to be assigned work that promises genuine social impact and positions that reflect their acquired talents.[3]

Given a combination of educational momentum and a growing number of older people, what challenges and opportunities lie ahead for continuing education as the United States forges onwards in the new century? In our exploration of this question, we will focus on models of elder learning that

offer paths to self-discovery and fulfillment in retirement, emphasizing two options closely linked to institutional higher learning. We will also consider continuing education's role in the retraining of elder citizens for re-employment and volunteer work. But first, it is helpful to gain perspective on the recent expansion of elder learning within higher and continuing education.

Education for the Adult Population

Since the middle of the twentieth century, American higher education has expanded to accommodate a massive influx of new students through major funding increases by the federal government in the form of the GI Bill of World War II, and as a response to the launching of Sputnik in 1957 by the Soviets. Another factor contributing to this expansion was the trend later in the century of a shift from the unilinear career path to a multilinear one, as Americans on average pursued as many as six careers over a lifetime. These career shifts necessitated additional training and certification, which higher education was able to provide. Similarly, the shifting patterns of the job market, with new fields of technology and the service industries replacing declining or obsolete areas of the economy, forced the retraining of adults in the workforce, both by the private sector and by higher education.

What challenges and opportunities lie ahead for continuing education as the United States forges onwards in the new century?

What emerged from these major developments toward the end of the century was a growing realization by institutions of higher education that they had a dual sense of mission: both to educate the best and the brightest for the traditional undergraduate and professional degrees and to provide continuing education for non-traditional students of all ages. By the 1990s, these non-traditional college students (more than 25 years of age, studying part time, and largely female) were challenging the hegemony of the traditional student (17 to 22 years of age, studying full time, residential, and principally male) who had been the standard in collegiate education.

If we look closely at the experience of Harvard University, for example, we find that since the presidency of Derek Bok in the 1970s, America's

oldest institution of higher education has been undergoing a paradigm shift from predominantly educating traditional students to a dual mission that also addresses the educational interests and needs of non-traditional students. As President Bok observed in his Commencement Address in 1982:

> Consider this fact, for example. We now enroll about 15,000 students in traditional degree-granting programs. But currently we teach more than 30,000 additional students in a variety of non-traditional ways. And that figure has almost doubled in the last decade.

When we review the effects of this paradigm shift two decades later, in 2002, we are struck by the fact that the number of full-time traditional degree candidates has increased modestly to about 18,000, whereas the number of part-time non-traditional students in all the Harvard schools has almost tripled to some 80,000. What has been happening at Harvard is being replicated at many other universities in the United States, both private and public. The broadening of the conventional educational purview through the rising number of non-traditional students has been fed by falling birthrates in the US and abroad as well as innovations in higher education such as distance learning, changing the face of education.

Adult Learning in Traditional Continuing Education

Alongside the non-traditional students, more and more retirees are seeking educational opportunities to pursue their intellectual and cultural interests. National organizations of continuing higher education in the United States have created entities to deal with this trend. The Association for Continuing Higher Education (ACHE) established an Older Adult Learning Network "to provide—and share—information on the growing importance of older adult programming as an integral part of continuing higher education." As ACHE announced in its January 2002 newsletter:

> As our nation's population ages, it faces social challenges for families, health care, communities, political structures, and the economy. This social phenomenon also challenges our system of higher education as more and more older adults seek access to academic programs. As our educational institutions attempt to accommodate older adults, we face the difficulties of changing institutional philosophies, practices, and attitudes. New research on older learners, their motivation, and the programs that serve them helps to provide a better understanding of older adult learning.[4]

The other major organization for continuing higher education in the United States is the University Continuing Education Association (UCEA), founded in 1915. Since 1990, it has published an invaluable compendium of national data on trends and participation in continuing higher education titled *Lifelong Learning Trends*, now in its seventh edition. The data show a dramatically expanded need for lifelong learning in our society, with part-time student enrollments increasing at a rate of three times that of full-time students, so that "now nearly half of all students currently enrolled at all levels in higher education attend part-time." Indeed, in the last 30 years, the number of part-time student enrollments in American colleges and universities more than doubled from just under 3 million to an estimated 6.2 million. Some 20 percent of enrollees in part-time courses are persons aged 50 or older.[5]

Continuing education has moved to the forefront of higher learning.

Non-traditional enrollment trends and continuing higher education are now inextricably mixed. As one commentator observed,

> Even though the American rate of college going is the highest in the world, tripling since 1960, those with bachelor's degrees are, interestingly, those most likely to pursue lifelong learning opportunities. The learning needs of the learned are insatiable. . . . Continuing education has moved to the forefront of higher learning.[6]

Unlike the popular perception that most students now are gravitating toward "practical" and "marketable" fields such as business or computer science, we find that "advanced liberal arts programs are popular" nationally among adults enrolled in continuing higher education programs, both for career enhancement and for personal enrichment. Part-time Master of Liberal Studies programs between 1975 and 1997 grew from 12 to 112 at colleges and universities in the United States.[7] Similar growth patterns are in evidence among programs for adults of retirement age, be they institutes for learning in retirement or Elderhostel-sponsored courses or offerings on campuses in the United States or Canada.

The conclusion of these trends is clear. Adults will continue to seek a mix of credentials and community in their educational pursuits. This is an easy forecast to suggest. The challenge, of course, will be how best to accom-

modate these adults in higher education in the years ahead—particularly the immense baby boom generation. Traditional modes and loci of education may not satisfy or suffice. Planners will need to be flexible and sensitive to a number of factors, including attention to racial, ethnic, and socioeconomic diversity.

The Coming of the Baby Boomers

The first wave of the 78 million-baby boom generation (born 1946–64) has entered retirement, and is the most affluent, the healthiest, and the most self-directed generation in our history. Their higher income, better health, and generally richer quality of life correlate with higher levels of educational attainment and interest in education. Moreover, it is widely acknowledged that the more education Americans have, the more education they seek as they age. The baby boomers, already the best educated generation, show every sign of conforming to this pattern. According to the US Census Bureau's *An Aging World: 2001*:

> The educational attainment of the elderly has risen during the last several decades in many countries, and will continue to increase in the future. For example, around 27 percent of the elderly in the United States had completed at least secondary education in 1980; by 1998 the percentage had jumped to 67 percent. As younger, more-educated cohorts continue to age, their attainment levels will be reflected in the education status of tomorrow's elderly.[8]

It is widely acknowledged that the more education Americans have, the more education they seek as they age.

Colleges, universities, and a variety of institutions for higher learning see the baby boom wave building and are preparing for its arrival. The boomers represent strength in numbers and they can be expected to make their preferences about education known as they have in other areas of their work and leisure lives. They will probably seek to modernize traditional pedagogy and to include more flexible teaching formats and styles along with an increased use of technology, including distance learning.[9]

One form of distance learning likely to take hold is that of "hybrid courses," that is, courses that follow a lecture format with students in class, but with streaming video. These lectures can be put on the Internet within 48 hours to students around the world. With fortuitous timing, universities have found that their scarcest and most valuable resource, faculty, can be used most effectively in offering "hybrid courses." Moreover, in-class students find the option of rewatching the lectures on their computers a pedagogical enhancement to their mastery of the material. The future of higher education and continuing higher education will, we predict, involve more widespread use of "hybrid courses," and the distance education model will serve a wider and more diversified audience of both traditional and non-traditional students, including baby boomers.

Meanwhile, older learners aged between 50 and 90 are becoming increasingly visible on campus, led by the vanguard of retiring boomers. Many of these people in the third age of their life, liberated from the rigors of the workplace, will increasingly discover that retirement does not have to mean withdrawal from activity, and will choose further education from among options that include travel, relocation, golf, and volunteering. Financial stability will enable them to pursue study for the pure pleasure of learning. Others, under financial constraint, will seek job-related training programs for computer and business skills, or even manual and customer-service skills. Still others may pursue training useful in volunteer work.

Unfinished Business and Self-Fulfillment

While the impetus for job or volunteer-related training is clear, the motivation behind learning for self-discovery and fulfillment is more involved. Carl Jung and Erik Erikson, among others, have examined the motivation to take up new subjects of study and inquiry in later life. Jung described the need for two stages of education, each unique to the life circumstances of the individual.[10] Invoking the metaphor of the morning and the evening, he compared the education that prepares a person for a career and for participation in society to the morning of life. The evening of life, he maintained, is the time for self-discovery and individuation. Jung noted that the demands of family, work, and career require the sacrifice of youthful joys and talents. To succeed in the public realm, people constrain their vision and imagination in order to conform to social expectations, frequently to the detriment of their personal growth.

Similarly, Erikson viewed post-career life as the opportunity to find integrity and completion, using education as a tool for self-discovery, rather than for world-mastery, which dominates the work years.[11] In the earlier, developmental stage of life, the self performs as an object among objects in the world. People establish their careers, and derive their sense of identity principally through such public roles as lawyer, teacher, firefighter, computer technician, or engineer. This active self dominates thought and action in mid-life. In later life, the self becomes the object of reflection. Self-discovery becomes the discovery of meaning.

Institutes for Learning in Retirement

The contemporary older learner, then, seeks different goals and satisfactions from education in later life, and also chooses different means to attain them. Older people, with decades of expertise and life experience, are more eager to acquire knowledge that fits into their understanding of the world and engages their experiences in constructive ways. They prefer to take part in determining the content and shape of their studies and to share their newfound knowledge in a collegial learning environment. Hence, the style of learning sought by the older learner is active participation and learning from peers. The seminar format is most suitable with its emphasis on a small number of students and spirited discussion. Active participation is complemented by a collegial environment where friendships, new and old, are fostered, enhancing learning. While technological advances and distance learning make for greater efficiency—and may accordingly appeal to the baby boomers—personal interaction, active participation, and peer learning retain the most appeal. These are the hallmarks of the Learning in Retirement (ILR) movement.

The ILR phenomenon is also characterized by its formal affiliation with institutes for higher learning, as well as by its intense variety of programs. They range from small groups of 25–50 members partaking of sessions that last one-to-four weeks, to the medium-sized (260 members) model of the New School for Social Research running a full semester, and upwards to large-scale institute memberships of 1,200–1,500 at Duke University and Dartmouth College, New Hampshire.

The ILR movement began in 1962, at the New School for Social Research in New York City. There, a group of retired public school teachers received approval to design and manage their own schedule of course offer-

ings, providing faculty from within the membership. The participants themselves agreed to organize and teach in their own autonomous learning groups. The concept had appeal for a sound set of reasons: it offered the chance to make up for educational opportunities lost due to military service, family, or job commitments; access to classes held locally and during the day obviated undesirable commuting; and the absence of examinations and credit status made for a relaxed, cooperative experience. The success of the newly named Institute for Retired Professionals encouraged other universities, including Harvard, to follow suit. In 1977, Brooklyn College, Harvard, and Duke Universities all founded their own ILRs. Abroad, a similar entity, the University of the Third Age (U3A), was established in France in 1972 and later, in England, in 1982.

By 1985, about 50 ILR programs had been established at colleges and universities in the US, primarily on the East and West Coasts. In 1988, the Elderhostel organization assumed the leadership role of central coordinating agency to help form other learning in retirement institutes. Under its aegis, between 1988 and 1999, more than 200 new ILRs were started in North America. Today, it is estimated that there are approximately 500 university-affiliated institutes around the country serving some 100,000 people. A national leader in the field, the Harvard Institute for Learning in Retirement (HILR) now provides an enrolled membership of 500 with weekly graduate-level seminars across two semesters, 50–60 per semester.

Adult learning for self-fulfillment has even evolved into a lifestyle choice . . . [and] many now seek to live in an educational community among friends and peers.

The Residential Campus for Retirees

Beyond ILRs, adult learning for self-fulfillment has even evolved into a lifestyle choice. Whereas climate and/or closeness to family might once have been deciding factors in a post-retirement relocation, many now seek to live in an educational community among friends and peers. An increasingly popular alternative to conventional assisted living facilities is the location of retire-

ment communities contiguous to college campuses, where residents interact with college students and share their cultural and physical amenities. Notable examples include Lasell College in Newton, Massachusetts; the Kendal Institute of Lifelong Education at Dartmouth in Hanover, New Hampshire, allied with Dartmouth College; and the Center for Creative Retirement at the University of North Carolina at Asheville, North Carolina. For retirees, the mingling with younger students provides mutual stimulation and a heartwarming sense of relevance. The younger students are prompted to address and reject ageist stereotypes.

Lasell Village, founded in 1995, is the first of its kind to incorporate an education component as a requirement for membership. In a move to win zoning approval in the town of Newton, the college stipulated that residents must pursue 450 hours of study per year, either on the Lasell campus or at other area institutes, under the supervision of a full-time dean.

The popularity of the ILR and of the residential campus might suggest a widespread recognition of the importance of lifelong learning for society. But colleges and universities have, understandably, maintained their emphasis on service to the younger generation of traditional students. Now, however, that birthrates are falling in the US and abroad and distance education is being promoted as a low-cost alternative to traditional classroom settings, enrollments at some colleges—especially rural, residential liberal arts colleges—are shrinking. Older students and their needs may prove valuable to the institutional survival of some campuses, and yet another challenge for the institutions of higher learning that host elder learning programs will be to develop strategies for intensified marketing.

It is true that educational programs for the older learner do not offer significant fiscal relief in the form of large tuition fees. They are labor and attention-intensive, and, in terms of high-profile fundraising and entrepreneurial energy, they lack the draw of undergraduate education and graduate research for the donor in search of recognition. Nevertheless, even now they can serve an important public relations function, demonstrating the university's public spirit and willingness to give back to the wider community.

Retraining for the Workplace and Volunteering

A second important role for older adult continuing education is retraining for the workplace and volunteering. The negative economic climate and falter-

ing US stock market have kept at work thousands of people who might otherwise have been tempted to act on early retirement plans. Contrary to late twentieth-century predictions and retirement trends, older workers are now either staying in the workforce or returning to it in unprecedented numbers. According to *The New York Times*, "a higher percentage of those aged 55 to 64 held jobs [in 2003] than when the economy plunged into hard times in early 2001."[12] Some economic forecasters and social critics now predict that the retirement age will rise from 62–65 to 70 and older before long.[13]

For those who remain in or return to the work force, retraining will be important and continuing education is suitably geared to provide it. Retraining will be especially important for women who have assumed a central role in the aging work force. Many women entered the work force in their forties and consider themselves, at age 60, in mid-career. These women have discovered a radically altered work environment, one dominated by technology. For them, continuing education offers critical training in the form of computer, writing, and management classes. Training through continuing education will also benefit the men who might once have accepted early retirement incentives but are eschewing retirement and returning to work in order to offset shrinking pensions or to recoup lost pay to fund the longer and healthier post-employment life they anticipate.

For those who remain in or return to the work force, retraining will be important and continuing education is suitably geared to provide it.

Alternatively, for those who take the route of volunteering through mentoring, counseling, and hands-on roles—Jimmy Carter's energetic leadership of Habitat for Humanity is one dramatic example[14]—the acquisition of new skills through continuing education could be useful. As Marc Freedman has written so persuasively in *Prime Time*, volunteering represents a way for society to draw on the significant skills of older people for the enduring benefit of all members, at the same time as encouraging continued mental, physical, and spiritual health and active civic engagement among the older generations.[15]

Retraining for work and volunteering includes a larger, societal dimension as well. The US population, like many around the globe, is aging dramatically as scientific knowledge and medical advances enable longer and healthier lives. Meanwhile, labor forces have been shrinking due to layoffs in certain sectors, and to the retirement of older workers in others. Our society cannot afford to lose the productivity of a significant portion of its population by marginalizing older citizens, or balkanizing generations. It will be incumbent upon universities, colleges, and institutes for elder learning to find ways to educate older citizens to help them continue as productive social members.[16]

To harness the energy of older people for society's benefit, then, higher education needs to invest in programs for lifelong learning that provide opportunities for retraining and community service. Moreover, society needs a centripetal momentum that brings generations closer together for mutual respect and cohesion. What better role for continuing education than to facilitate and promote understanding between older and younger generations?

Learning That Never Ends

Older citizens have a vested interest in remaining vital, relevant, and interesting to each other and to younger generations, whose respect and admiration they stand to earn through shared education. They will also acquire new skills for continued work or for volunteering as productive members of society. More will make these choices as the baby boomer population mushrooms to some 70 million aged 65 and older by 2035. Institutions of higher learning need to explore and refine the role they play in keeping elders engaged and active through continuing education, whether by investigating new technological methodologies such as distance learning or by facilitating the establishment of new learning structures, such as learning in retirement institutes. Not to do so is to risk the creation of an "elder wasteland"[17] and to lose the opportunity for promoting understanding across the generations. For this century, as for the last, the motto "Learning Never Ends" will take on a new meaning as a classic credo of American society.

NOTES

[1] The two preceding ages are "childhood" and "active working life" and the fourth age is "senility and dependence."

[2] Carl G. Jung, in *The Portable Jung*, ed. by Joseph Campbell, New York: 1976), *passim*; Erik H. Erikson, *Childhood and Society* (New York: 1962), *passim.*

[3] Marc Freedman, *Prime Time: How Baby Boomers Will Revolutionize Retirement and Transform America* (New York: 1999), 245.

[4] *Five Minutes with ACHE* (January/February 2002), 7.

[5] *Lifelong Learning Trends*, 5th edition (University Continuing Education Association, 1998), 11.

[6] Jay A. Halfond, "Population Trends and Continuing Education," *The Journal of Continuing Higher Education*, 50:3 (Fall 2002): 45.

[7] *Lifelong Learning Trends*, 65.

[8] Kevin Kinsella and Victoria A. Velkoff, US Census Bureau, Series P95-01-1, *An Aging World: 2001* (Washington, DC: US Government Printing Office: 2001), 86–87.

[9] With advances in distance education courses and programs, from the British Open University to the University of Phoenix, we see the beginnings of yet another revolution in continuing higher education in the United States. To accommodate the needs of working adults, the distance course and degree option has a growing appeal, as more and more non-traditional students choose the convenience of taking courses at home or on the job to pursue degrees or certificates.

[10] *The Portable Jung,* summarized by Mark Novak in "The New Older Learner," *Continuing Higher Education Review*, 65 (Fall 2001): 98–105.

[11] Erikson, *Childhood and Society*, cited in Mark Novak, *op. cit*., 102.

[12] Louis Uchitelle, "Older Workers Are Thriving Despite Recent Hard Times," *The New York Times*, (September 8, 2003), 1. Older people, the article reports, make up 12 percent of the workers, up from 10.2 percent in 2000.

[13] Jane Bryant Quinn, "Retire Early? Think Again," *Newsweek*, 142:3 (July 21, 2003): 43.

[14] Jimmy Carter's involvement with Habitat for Humanity International began in 1984 when the former president led a work group to New York City to help renovate a six-story building with 19 families in need of decent, affordable shelter. That experience planted the seed, and the Jimmy Carter Work Project has been an internationally recognized event of HFHI ever since.

[15] This is the central thesis of *Prime Time*, where author Marc Freedman examines and extols volunteerism, mentoring, and role-modeling for and by retirees.

[16] *Ibid*., *passim.*

[17] Ken Dychtwald, *Age Power: How the Twenty-First Century Will be Ruled by the New Old* (New York, 1999), *passim.*