

# *Demographics and Lifelong Learning Institutes in the 21st Century*

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**T**hroughout the twentieth century the population of the United States, as indeed the rest of the world, was growing older. If you were born in 1900, you could expect to live, on average, for 47 years. A century later the average life span had been increased by 30 years to 77 years, and thanks to advances in medicine and domestic conveniences, the later years of life were characterized by a robust and healthy zest for living.

Since 1900 the percentage of Americans 65 years of age and older has more than tripled (from 4 percent in 1900 to 13 percent in 2009), and the number has increased from 3 million to 40 million. Whereas centenarians were a rarity in 1900, today we can find more than 64,000 of them living in society. Today, persons reaching age 65 have a life expectancy of an additional 18.6 years (20 years for women, 17 years for men). In the next decade the population over 85 years of age will increase in the United States from 5.7 million in 2010 to 6.6 million in 2020 (a 15 percent increase in just a decade) (US Dept. of Health and Human Services, 2010).

“Between 2010 and 2050, the United States is projected to experience rapid growth in its older populations,” according to demographers at the US Census Bureau. “In 2050, the number of Americans aged 65 and older is projected to be 88.5 million, more than double its projected population of 40.2 million in 2010. The baby boomers [people born between 1946 and

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1964] are largely responsible for this increase in the older population, as they will begin crossing into this category in 2011" (Vincent & Felkhoff, 2010).

In light of this demographic revolution among older Americans in the twenty-first century, we can begin to appreciate the great significance of a growing adult education movement referred to as lifelong learning institutes in the United States and universities of the third age (U3A) in Europe and the rest of the world.

A recent study titled *The Aging Intellect* by Douglas Powell examines the 60-80 year cohort of women and men (i.e., the third age of life) in terms of their intellectual functioning by dividing them into three basic categories: "optimal cognitive aging" (20-30 percent); "normal cognitive aging" (50-60 percent); and "high risk cognitive aging" (15-20 percent).

These categories and their percentages are based on both national and international norms, but if we just look at society in the United States, we can appreciate the great growth evident in this third age cohort. In the year 2000, there were 36 million women and men of this age group, "the largest number in history. In 2010 the figure grows to more than 45 million, and a decade from now the projected number exceeds 60 million, approaching one in every five Americans" (Powell, 2010, p. 3).

Predictably, members and potential members of the "optimal cognitive aging" cohort tend to be members of lifelong learning institutes. They exhibit the high energy for activities and the intellectual curiosity for continued learning. According to Powell, "Being open to new experiences and to new communication technologies characterizes these optimal cognitive ages" (p. 6).

The members of the "normal cognitive aging" cohort, comprising half or more of the third age population, can be characterized as "letting life come to them rather than seeking it out. They have not given up entirely on preserving their intellect, however, and when encouraged, they open their minds to new experiences" (p. 7). Clearly this large group has the potential for leading more active and rewarding lives if they could participate in a lifelong learning institute.

The third category, those with a "high risk for cognitive impairment," experience assorted medical problems and lead debilitating life styles that influence directly their ability to function in society. This group poses manifold problems for their societies in terms of health care costs, especially for the growing number of people with Alzheimer's and related dementia issues.

Given these clinical data on our aging population, it becomes clearer why the Lifelong Learning Institutes and the University of the Third Age (U3A) programs are so critically important to society in the future. The European U3A model antedates the Lifelong Learning Institutes in the United States; they came into existence in the 1950s, when a confluence of factors, such as an increasing life expectancy and compulsory early retirement in industrialized countries, created a need for a growing cohort of retirees seeking a self-fulfilling Third Age. Policy makers increasingly became aware of a vital connection between individual well-being and late-life learning opportunities. In a seminal article in *Adult Education*, titled "Learning, education and later life" (Groombridge, 1982), outlined five compelling reasons why education was critical to an aging population:

1. Education promotes self-reliance and independence among the elderly.
2. Education enables older people to cope more effectively in a complex and changing environment.
3. Education for and by older people enhances their potential to contribute to society.
4. Education encourages the elderly to communicate their experiences to each other and to other generations.
5. Education is critical for lifelong learning and self-actualization.

All these factors persuaded policy makers that education was crucial to delaying or reducing the inevitable dependence of an aging society on others and costing taxpayers huge sums to care for the elderly.

Predictably, in many European countries an array of adult education programs were created to address this need. The most prominent and the most successful was the University of the Third Age (U3A), which became the international adult education model for adult learners in Europe. But U3A was not a monolithic model; it originated as two distinct models, one French and the other British.

The French model can be dated from 1968 when legislation was enacted that mandated French universities to offer more education for the community. Toulouse University of Social Sciences in 1973 sponsored a popular gerontology course exclusively for retired people from the university and this resulted in the first U3A. By 1975 the U3A was open to all retirees without examinations and with minimal fees at other French universities and at European universities in Spain, Italy, Belgium, Switzerland, and

Poland. More than 170 member institutions comprised this French model by 1981 (wikipedia, 2011).

The British model of U3A was transformed in 1981 at Cambridge University, when it adopted a peer teaching and learning model among the participants instead of relying on teachers supplied by the host university. This British model proved successful in Anglophile countries, notably Australia and New Zealand. It provided a flexibility and economy that included modest membership fees, flexible class schedules and meeting places, a self-generated curriculum, and a sense of community among peers. By 1994 more than 32,000 participants were numbered among 240 U3As in England, Scotland, Wales, and Northern Ireland (U3A Marina Baixa, 2011).

Although the U3A movement has spread to many parts of the world from Europe, notably Asia and South America, it has not gained traction in the United States. Historically, the first peer learning program for retirees in the United States was the Institute for Retired Professionals (IRP), established in 1962 at the New School for Social Research in New York City. It was founded by a group of retired school teachers, mostly women, who prevailed upon the New School to provide space for a program designed to accommodate women and men interested in intellectual and social interaction in an academic environment. The New School obliged by providing classrooms and helping the group to organize themselves and arrange their course offerings and manage their curricular affairs. The IRP has operated without interruption for a half-century as of this writing in 2012, and it stands as the model for hundreds of similar institutes in the United States (New School, 2011).

Programs like Elderhostel, founded in 1975, and Institutes for Learning in Retirement (ILRs), dating from 1962 with the New School's IRP, have dominated in the United States, especially since the late 1970s. There are now an estimated 500 ILRs operating in North America, and although there is no single model for an ILR, they all share features with the U3A French and British model. But in the best tradition of American individualism, each ILR is the creation of a distinctive group of retirees, hosted by a college or university, with a special culture and sense of mission. Most ILRs try to maintain a manageable size to promote a feeling of community among the members. Educational background and affiliation with the host university or college are two of the most decisive predictors of membership in many ILRs.

A major developer of lifelong learning programs in the United States has been the Bernard Osher Foundation, founded in 1977 by Bernard Osher,

a successful businessman and a dedicated philanthropist, with its headquarters in San Francisco, California. The mission of the Foundation is to enhance the quality of life through its support of higher education and the arts in America. Among its many benefactions, the Foundation supports a lifelong learning network for adults under the aegis of the Osher Lifelong Learning Institutes, a consortium of 130 institutions of higher learning whose campuses house “Osher Lifelong Learning Institutes.”

Since 2000, the Foundation became interested in sponsoring campus programs designed for senior students, many of retirement age, eager to pursue learning as an end in itself. The Foundation focused on two existing models of lifelong learning: the Fromm Institute of Lifelong Learning at the University of San Francisco on the west coast and the Senior College at the University of Southern Maine on the east coast. In 2001 the Foundation awarded an endowment grant to the University of Southern Maine to improve its programs for adults and the name “Senior College” was changed to “Osher Lifelong Learning Institute.” Other Osher grantees followed as the Foundation issued grant proposal requests to campuses of the University of California system.

As a rule, grants of \$100,000 were made initially, with the understanding that, once an institute was operational, the Foundation would renew the grant for two or more years. Once the institute demonstrated its success and sustainability, an endowment grant of \$1 million or more was awarded. To date the Osher Foundation provides support to some 130 Osher Lifelong Learning Institutes on college and university campuses across the United States, with at least one Osher program in each of the fifty states and the District of Columbia.

The Osher institutes are not cookie-cutter models of organization and operation. They vary considerably among themselves. But, as the Osher Foundation notes, they all have common qualities:

Non-credit educational programs specifically developed for seasoned adults who are aged 50 and older; university connection and university support; robust volunteer leadership and sound organizational structure; and a diverse repertoire of intellectually stimulating courses (Osher Foundation, 2011).

And each grantee is mandated to carry the name of “The Osher Lifelong Learning Institute at University X” and the use of an “Osher Lifelong Learning Institute” logo to qualify as a member of the Osher national network (Osher Foundation, 2011).

Harvard University is distinctive among American and international universities as the oldest institution of higher learning in North America, dating from 1636, and one of the foremost research universities in the world, with a record number of Nobel laureates among its faculty and the largest university library. Despite these formidable academic distinctions, Harvard in 1977 recognized the need to join the emerging lifelong learning institute movement in the United States. Accordingly, in the spring of 1977, the Harvard Institute for Learning in Retirement (HILR) was founded and 92 charter members assembled in the Library of the Harvard Faculty Club to hear David Riesman, Ford Professor of the Social Sciences, give them his inaugural address. The occasion was historic as both Professor Riesman and the new members appreciated, for Harvard had chosen to be among the earliest universities in the United States to recognize the emergence of a new cohort of learners to study at Harvard. Professor Riesman in his address reminded the new members that as adult learners they were at Harvard purely for the love of learning, unlike undergraduates and graduate students preparing themselves for careers.

After Professor Riesman's address, the members adjourned to an adjoining room of the Faculty Club to divide themselves, according to their interests, into "study groups." They formed a total of thirteen study groups, each with a designated discussion leader, and the HILR peer teaching and learning model was put into action from the outset. The topics ranged from Western Civilization to foreign language study to creative writing to literature. As the membership of the HILR grew over succeeding years, so did the number and variety of the study groups.

Learning in retirement institutes as a rule take on the coloration of their host institution, and the HILR benefited from its affiliation with Harvard University, both the oldest institution of higher learning in North America and the premier university in the world. From the outset, the HILR reflected the academic cultural excellence associated with the Harvard name, a tradition it maintains scrupulously to this day.

The size of the HILR has in recent years been maintained at a steady state of 500 to 550 members. In the fall semester an average of 525 members enroll in 50 full (12-week) and 16 half (6-week) courses of peer teaching and learning. Members enroll for one course (25 percent), two courses (50 percent), and three or more courses (25 percent). In the spring semester an average of 500 members enroll in more than 40 full and 22 half courses. Happily, the majority of the members get their first choices among the many courses sponsored each semester.

The annual budget, based on an annual tuition of \$800 for each member, amounts to more than \$400,000, but scholarships and tuition waivers are available for members whose personal circumstances warrant them. The annual tuition enables members to enroll in one to three courses per semester, access to special events sponsored by the HILR (concerts, lectures, social gatherings), and one subsidized course per semester in the evening Harvard Extension School. Perhaps the most valued benefit to members is the use of Harvard's world-class library system.

Each year an average of 50 new members are admitted with roughly half joining each semester. All candidates are interviewed by members of the HILR admissions committee to ensure their suitability to the peer teaching and learning culture of the Institute. The acceptance rate varies from between 50 percent and 75 percent depending on the size and diversity of the applicant pool. The gender ration is roughly 50-50, with women representing a slightly higher percentage at times. The age range spans from a youthful 53 years to a venerable 96 years, with an average age of 76 years. Of the 550 members today, approximately half have belonged to the HILR for a decade or more. The career background of the members reads like a professional *Who's Who*, with medicine, law, education, engineering, architecture, social work, government service, business, and music among the many represented. One member, for example, joined 31 years ago and has offered a total of 64 courses, while contributing to the operation of the HILR as President of the Council, chair of a variety of committees (curriculum, teaching, and learning, nomination), and serving as a mentor to incoming members.

HILR expects active participation and volunteerism from its members to complement the peer study group leadership format. Each semester at least 80 members serve as study group leaders or co-leaders and another 150 serve on standing or non-standing committees. Others volunteer as English language partners for foreign students enrolled in the Harvard Extension School or serve as monitors in the HILR library or as hosts and greeters in the Common Room at coffees and at lunch hour.

The extracurricular activities of the HILR add a richness to the academic program that the members value highly. "Fridays at HILR" is a program of Friday morning discussions, lectures and performances featuring Harvard and local faculty, public intellectuals, journalists, artists and musicians attended by 50-60 members interested in the political, economic, social, and cultural issues of the day. Similarly, the "Distinguished Speaker Series"



draws upon Harvard faculty and others from the community to address issues related to the environment, health care, politics, religion, and literature. Finally, the academic year opens with convocation in Harvard's Sanders Theatre for the membership. In recent years Sebastian Junger, author of *The Perfect Storm* and *War*, spoke about his personal experiences with a combat team in Afghanistan. In the fall of 2011 the convocation speaker was Dr. Atul Gawande, both a surgeon at Boston's Brigham and Women's Hospital and the Dana Farber Cancer Institute and a staff writer for the *New Yorker* magazine. He addressed the audience on the role of doctors who counsel the poor and underrepresented on how to manage their own health care, how to control obesity and diabetes, and how to reduce public health care costs.

In recent years members of the HILR have produced notable publications, such as *New Pathways for Aging*, a collection of insightful personal essays on how the learning and social opportunities of the HILR create a sense of community and self-fulfillment that results in healthier, happier, and more engaged retirees. A follow-up study explored the transformation of members' lives as they experience the benefits of having group participation and social engagement at the HILR. This project, titled *Who Are We Now*, appeared in 2012 on the occasion of the HILR's thirty-fifth anniversary.

To celebrate its thirty-five years of estimable existence at Harvard, the HILR in April 2012 staged five special events:


1. An anniversary dinner for 400 HILR members and distinguished guests at the Charles Hotel, Cambridge.
2. An academic forum for HILR members and the general audience on "The Rebuilding of the American Middle Class."
3. A chamber concert of American music organized by HILR member Dr. Matthew Ruggiero, former principal bassoonist of the Boston Symphony, and a featured original composition commissioned in honor of the HILR's anniversary.
4. A joint production of "Taming of the Shrew" and "Kiss Me Kate" presented by the HILR Musical Revue and the HILR Shakespeare Players.
5. A commemorative booklet on the HILR's long and distinctive role in the history of the learning in retirement movement in the United States will be published and distributed.



The 35-year history of the HILR is presented as one model for such an institute at a major American university. But there are hundreds of such lifelong learning institutes throughout the United States, with more added to the total each year. In 1988 some thirty ILRs joined with Elderhostel, Inc. to form a voluntary association called Elderhostel Institute Network (EIN) dedicated to creating new institutes and supporting established institutes. By 2000 there were more than 200 new ILRs founded in North America under the aegis of EIN. Each institute was unique, but all shared three criteria:

1. Each institute was sponsored by a host college/university to ensure academic integrity and so members would have access to the many benefits of being located on a campus of higher learning.
2. Older learners are encouraged to take “ownership” of their institute by becoming members and paying dues to support it.
3. Members are encouraged to volunteer participation in their institute, which helps develop a real sense of community among older learners (Road Scholar, 2011).

The best estimates are that, if we include institutes that are not officially connected to a university (300-500) to those that are, we arrive at a total figure of 1,000 in North America. Likewise the U3A movement can claim 820 separate sites with nearly 300,000 women and men served. And on the first of January 2009 the Virtual University of the Third Age (vU3A) was launched for those isolated or homebound for health reasons but eager to participate electronically in the learning and sense of community enjoyed by other U3A programs (Virtual University, 2009).

The lifelong learning and U3A movements in the United States and around the world will continue to grow as the population ages and seeks learning and teaching opportunities for self-fulfillment and enhanced cognitive functioning in later life. Given the success of these adult education movements, this would seem an opportune time for universities without such third age programs to give serious consideration to starting one. 

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