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Education and Socialization for Elderly: A Comparative Study between Portugal and Italy

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Abstract: Universities of Third Age have been assuming a central role in elderly education. This research investigates what are old adults learning and how do they learn in U3A.

Keywords: Education, Socialization, Elderly, Universities of Third Age

A general overview in our theoretical framework

In recent decades, with the increasing of the number of old adults, several researchers have shown a growing interest in the study of ageing. Some studies focused on global changes in behavior through the processes of ageing (Ribeiro & Paúl, 2012); the crucial importance of social networks in the process of ageing, loneliness (Ribeiro & Paúl, 2012) and disability (Gasperi, 2016). Psychological studies investigated the elderly's learning trajectories, defending a positive influence of learning on their well-being, self-esteem, and self-confidence (Pocinho, 2014). Sociologists have been concerned with the role of Universities of Third Age (U3A) in the adult lives (to reinforce social networks and strength the social capital) (Veloso, 2011). Looking to elderly education we can see a rather recent focus of inquiry within adult education (Veloso & Guimarães, 2014). The topics can refer to: wisdom of the older adults (Jarvis, 2012); inter-generational learning (Formosa, 2014); the role of state and non-governmental organizations (Veloso, 2011); and the significance of the educative experiences in old people (Gregianin, 2011).

Educational practices for the elderly, based in the educational gerontology, can be defined from standpoints of the functionalist approach and critical educational gerontology (Formosa, 2014; Veloso & Guimarães, 2014). Here, we move away from activity theory (i.e. finding new roles in later life to avoid mental or social decline) and towards the view of education as an opportunity to promote social participation and active citizenship among older adults (i.e. elderly have the possibility to change their situation, it can propose a real change in his life). According to Freire's work social change is important and evolves a continuing reflection and horizontal dialogue between learners and educators: "knowing how to teach is not transferring knowledge but creating the possibility for its actual production or construction" (Freire, 2005: 47); so, the individual is also responsible for the transformation of his situation.

Sanz Fernandez defines three models of education and learning for adults: *literacy model*- includes basic literacy and numeracy; *social dialogic model*- attempts to help adults acquire social and cultural skills required by a rapidly developing democratic society, based on horizontal relations and dialogue between individuals"; and *productive economic model* - gives priority to workplace skills (Sánchez Fernandes, 2008, p.75-76). These approaches differ in aims, methodology, profile of educator and role of the learner. The aim of the author is to create an interaction between the models, to be able to "understand the phenomenon of education and learning in adults" (Sanz Fernández, 2008, p. 95).

Research Context and Methodology

Considering these premises, we can see few studies focusing the involvement of the learners: the learners can act as passive subjects in the practices already predicted by others or can have an active behavior, connected to awareness and social emancipation. Moving from this last consideration, we propose this paper where the main question is: *what are adults learning in U3A and how do they learn in it?*

The U3A arises as entities tailored for old adults with the intention to provide the appropriate response to the needs and educational problems of that population. Furthermore, the U3As represent a service for the entire community and are composed by a basic triad – Learning, participation and community life – which fills the educative and social needs and solves the existing problems in this sector, while at the same time promotes the welfare and the active aging (Veloso, 2011); it can attend diversified places, more or less emancipatory, depending of the aims and on which educational practices are being developed. Our questions are: a) which is the educative offer in the U3As? Do older adults merely follow what has already pre-determined by others or are they actively participating in planning and development of such activities? b) How do older adults learn? Which education and socialization dynamics appear in the U3A?

The study was developed in two countries: Portugal and Italy. After some informal conversations to get preliminary information on the reality of the U3A in these two contexts we developed a national survey (Ghiglione & Matalon, 1997) concerning the aims, organization and educative work. The online survey was provided 63 valid responses for both countries. We analyzed the data with support to SPSS and we get some content criteria regarding educative aim and type of activities. Afterwards, we selected a few cases to conduct a deep study (Stake, 1994) (two cases each country, in a total of four different cases).

This paper reports on our four case studies and a first draft of a possible comparison of the results. In each case study, we conducted naturalistic observation (Yin, 2002) and interviews (Fontana & Frey, 1994) to different types of participants. Furthermore, very important resulted the documental analysis.

General Presentation of the Cases

Our first case: *University of Culture* (besides the 70 courses, they offer a large opportunity of cultural visits and travels), is situated in the center of Portugal (175 000 inhabitants). It started in 2013, created by a group of friends. Up to this date it counts more than 1000 learners (aged 31 to over 80, and from all social classes and academic degrees) and more than 70 different courses. The participants must pay a fee per course. This University is based in an association and is self-sustainable. To conduct this study, we led nonparticipant observation for two weeks and we did 20 interviews to different members in the university. We identified more than 50 publications of the university, an official recognition as a service for the community, awards and trophies- from competitions of poetry and creative writing. Also, interesting is the fact that this U3A “never closes its doors”. During the summer months, when there are no courses, the university still offers several cultural opportunities, e.g. field visits at national and international level.

Our second case: *Social University*, because of the high attention and care given to the learners, is situated in the south of Portugal (65 000 inhabitants). This U3A is an educational project of the Red Cross and is for everyone; the fee of inscription changes depending the economic situation of the learner. It was created in 2013 and counts 100 learners and 25 different courses. To conduct this study, we led nonparticipant observation for two weeks and 12 interviews to different members in the university. We want to highlight the Academy report “Read me” produced by the Writing workshop and the pioneer project “Lethes Go Caffè” - internship project of a social educator, aimed to create a space of proximity, sharing of knowledge and experiences.

Our third case: *Research University*, because of the years they dedicated to the research, debates and conferences, is situated in the center north of Italy (390 000 inhabitants). This U3A appeared in 1981 and was one of the first in the country. Based in a catholic association, its logo: “*Fides et scientia*” (faith and science) reveals its main concerns and the focus of the context. It counts 240 participants and a total of 44 courses. They give huge importance to conferences, offering at least two a week. To conduct this study, and

because they had overlapping lessons, we led nonparticipant observation for approximately one month and 12 interviews. Here, we highlight the high fee for participate in the global course (basically conferences) and the extra fee for any further specific course (e.g. laboratories of arts or languages). Interesting seems also the fact this U3A has staff with the role of RP (Public Relations): receives the persons and is the mediator between adults and university.

We called our fourth case: *Community University*, because it is the project of the municipality to cater the educational and social needs of the elderly in their community. It is situated in the center north of Italy (17 000 inhabitants). This U3A appeared in 1995 as a response of the municipality to the city. Up to this date it counts 260 participants (this is their limit given the available structure and limit of lessons). To conduct this study, we led nonparticipant observation for approximately one month and 12 interviews. Its structure stands out because they are divided in 3 parts (2 months each), being the second one marked by the laboratories (e.g. languages and theater). The first and the last parts are mainly directed to frontal conferences. We highlight that one afternoon a week they receive a local personality of companies from the city, going there to talk about their work. Also, learners are coming from more than 20 different surrounding cities. Otherwise, some learners would like to have more time for laboratories (little groups) and less time for conferences.

Findings

Considering the data from our observations and interviews, we defined some categories and we arrived at some results that look positive for the adults:

- *learning and cultural update*, it means that retired adults have the possibility to keep learning and in contact with learning and cultural activities. These factors give to individuals the possibility to learn something new or to remember and update their knowledge.
- *interpersonal capacity*, as a context of persons, they create relations between them. Our data shows that U3A are a context where the old adults can develop relations, social groups and in some cases create a little community (that they call by family).
- *valorization of skills and life experiences*. Contexts as U3A seem crucial for the valorization and the sharing of experiences. These adults that gained knowledge and experience through their life, have a personal richness to share with others. In some cases, we can see that the adults learn from each other. The fact they can learn and teach at the same time, so as share their skills and knowledge make them feel good, with a role and a purpose (Formosa, 2014).
- *social integration*: participating in a U3A seems to give to adults the role and to fulfill their need to feel part of something. It also opens the possibility to establish important ties with the wider community. Many adults involved in the U3A and stimulated by it, participate in the community. They can participate in open activities, for prevention or sensibilization, supporting several institutions as volunteers, etc.
- *promotion of health and well-being*. This seems to be one of the most important issues for the elderly. In fact, if the U3As are a success nowadays is because the adults go there and feel good. They are free to choose and to participate in the activities they want. In some cases, they are proposing new activities and developing them. This seems to stimulate the elderly to learning and participation.

In order to visualize our data in a first comparison among our four cases we decided to create some tables. Considering the aims of this paper, we compared: 1) Education offer in the U3As; 2) Participation of Older Adults in Activities; 3) How do adults learn in the U3A?

Table 1: *Educative offer in the U3As*

Case	Conferences	Cognitive Development	Physical maintenance	Performing Arts	Artistic Strand	Cultural visits
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1	1 per week Not the main point of the U3A	During the year	yes	yes	yes	Yes (Main activity in summer)
2	Sporadically	During the year	yes	yes	yes	Yes (Inside the courses)
3	Based in conferences	yes (extra fee)	-	yes	yes	-
4	Based in conferences	yes (2months)	-	yes (self-organized)	yes (2 mos.)	yes

(Authors own, 2019)

In our first table we can see the different academic offer of the studied U3As. The offer is diverse and goes from conferences, to activities for the cognitive development and the physical maintenance, to performing arts, and to cultural visits. We highlight the fact that the cases 3 and 4 (Italian cases) focus their practices mainly on conferences (frontal). However, in Portugal is possible to declare that they focus their activities in specific, more individualized courses. These can be a way to give a better response to the individuals' needs. Another interesting point is that in Portugal they give the same importance to activities related to physical maintenance as to the ones related with cognitive development- instance not visible in the Italian cases. In all the four cases we can see the presence of performing arts, being them some of the activities that most increase the self-esteem of the older adults; it helps them to get free from stereotypes, being themselves and having an active role in a specific group.

Table 2: Participation of Older Adults in Activities

Case	Choosing	Proposing	Planning	Developing	Evaluating
1	Yes	Yes	Yes	yes	-
2	yes	Yes	Yes	yes	-
3	Yes	Yes (final survey)	-	Yes	Yes (final survey)
4	yes	Yes (final survey)	-	yes	Yes (final survey)

(Authors own, 2019)

In our second table we can see the participation of older adults in the activities according to some criteria: choosing, proposing, planning, developing and evaluating. In all cases, the participants: can choose the activities they want to participate in; and are participating in the developing of the activities. Regarding the proposing and the planning we can see that in Portuguese U3As there is space for the proposals, as their flexible curriculum makes possible a deeper involvement of the adults (they can decide the program together and propose new things during the courses) also in the plan of their own activities; in cases 3 and 4, the U3As give the possibility of proposing and evaluating the activities in a final written survey. Based in the responses of this survey the direction decides how to act in the next year.

Table 3: How do adults learn in the U3As?

Case	Methods	Practices	Participation	Dynamics	Affectivity
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				“Learn each other”	“Recognition of affection, fun and pleasure in learn”
1	Participative	Flexible	Active	Versus dynamic Educator-Learner	yes
2	Participative	Flexible	Active	Versus dynamic	yes
3	Passive	Non-flexible	Passive	-	yes
4	Passive	Non-flexible	Passive	-	yes

(Authors own, 2019)

In the last table we can see how adults learn, meaning how learning activities are structured: methods, practices, type of participation, dynamics and feelings described by “affectivity”. We created these categories with the support of the qualitative data.

For a start, we highlight the main differences between the two countries. In the first two cases we can see participative methods, flexible practices and consequently an active participation which conduces to interesting dynamics among different learners and between learners and educators. On the other side, the hard structure of the Italian U3As seem to limit the work and the benefits of this context for the elderly. They develop a strictly structured organization, with frontal lessons enacting on the transmission of information and passive methods. Consequently, there is a passive participation of the individuals, and the only visible dynamic is the one of the traditional schools, where the professor debits the knowledge to the students, without any kind of dialogue or questions. Finally, we would like to highlight one last point: Affectivity, which can be defined as “Recognition of affection, fun and pleasure in learn”. This point is common to all our cases, revealing the importance that the U3A can have in older adults’ lives. The encounter between learning, socialization and community - as attested by Veloso (2011) - seems to be the key for the dimension of affectivity in the U3A. The older adults are able to recognize the affection, have fun and find pleasure in individual learning as well as in social engagement.

Final considerations

In this paper we tried to compare some qualitative data regarding four different cases. The aim was to understand what activities are the U3A offering and how are the old adult participating in them. The first issue we want to stress is that our results should be looked with precaution, as they are the preliminary result of an ongoing study.

It seems however safe to observe the importance of studies regarding the elderly and specifically the activities of learning directed to them. Is possible to see the similarities between the cases of the same country and this fact can be related to political and historical reasons.

Relatively to the approaches to elderly education, it is possible to declare that in the Italian cases the U3As seems to work essentially as a formal school for adults with structured programs and frontal lessons that can take 100 or 200 of adults at same time. Trying to analyse these results we can say that the development, the structure and the models of work followed in U3As in Italy seems to be strongly related with the conception of traditional school. Based in a model predominantly passive, transmissive and where one person (speaker) is the expert and has all the relevant knowledge about the topic. In this case, the idea of going to a school “to hear the expert” makes the adults feel prestigious as students and as individuals; it follows a positive impression in traditional scholar models. Furthermore, we can attest that in an educative culture as the Italian one, where the prevalent actions are

constricted by a strong bureaucracy, few resources and limited structures, it seems easier to create programmes and activities that are simple to manage, i.e. conferences.

On the other hand, in Portugal, the cases seem to follow a more dialogical model - see Sanz Fernandez (2008) - where the individuals can freely socialize, being themselves, sharing their life experiences and learning in a horizontal way; where the responsible works as a mediator, educator or a facilitator but not as a teacher. These U3As look like places where the individuals are together and learn from each other (Formosa, 2014). In some lessons, they engage in several ways- offering suggestions, planning and designing activities, and participating in their enactment. Although is not possible (yet) to talk about a critic emancipatory education as the one suggested by Paulo Freire (Freire, 2005; Veloso, 2011), we can see that there are some “windows” open in that direction. These U3As seem to be an educational context for elderly with a crucial role in the social and democratic challenge, by including everybody and promoting opportunities to dialogue, interact, and share experiences.

In general, all the contexts look as fundamental to promote education and fight isolation among the elders, creating friendships and social participation through activities. Giving to the older adults the possibility to find responsibilities and roles in their lives, UTAs show results in a direction of educational gerontology (Veloso, 2011).

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