A COMPARATIVE STUDY OF TWO NON-CREDIT EDUCATIONAL ORGANISATIONS FOR OLDER PEOPLE: THE UNIVERSITY OF THE THIRD AGE (U3A) IN THE UK AND THE SENIOR UNIVERSITY (SU) IN SOUTH KOREA

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ABSTRACT

This empirical inquiry was designed as a comparative study to facilitate in the development of theoretical models that can promote a better understanding of the forces that shape the teaching and learning of older people in different cultural settings. For an examination of cultural similarities and differences, this thesis adopted a cross-national comparative method to study two institutions of third age learning, that is the University of the Third Age (U3A) in the UK and the Senior University (SU) in South Korea.

In order to achieve a more active comparison, this research followed the systematic approach of comparative study advocated by Bereday (1964), and employing multi-faceted analysis according to the cube method of Bray and Thomas (1995) for a full and balanced understanding of the research subject. Quantitative and qualitative methods have been used in combination to capture the differences across the two institutions in terms of participants' educational needs and their experiences, and the historical development of each institution, in order to analyse the different cultural meanings attached to learning and ageing in the two countries (Evans, 2001). This thesis also draws on national statistics and research reports in order to understand the broad trends. Policy thinking about the learning society and the ageing society are usually based on the same economic point of view, and governments tend to focus on the instrumental aspects of education. Therefore, in many countries older people have created learning opportunities for themselves, specifically U3A in the UK and SU in South Korea.

In this study, U3A and SU's cultures of learning are compared: the mutual aid or self-help model and organisation-led welfare model; the informal learning orientation and formal learning orientation; the andragogical and pedagogical models; the buffet or cafeteria style and set-menu style; horizontal and vertical teacher-student relationships; bottom-up and top-down management styles. Analysis of all these differences supports the conclusion that U3A is based on the tradition of liberalism and self-help tradition in the UK and SU is based on the tradition of collectivism and Confucianism in South Korea. The members of the U3A have a middle-class background and culture, and so dominantly feel more comfortable with an academic, discourse-based form of learning, while the SU members had a 'Botongsaram (ordinary person) culture' in which they preferred practical activities and pastimes (such as music and dancing) to academic subjects. This research will be of help to academics and policy makers to understand cultures of learning from the perspective of the third age group, so as to develop different learning models to satisfy the diverse interests of older adults in third age learning.

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ABBREVIATION

- CBS: Credit Bank System
- DfES: Department for Education and Skills (predecessor department to DIUS).
- DIUS: Department for Innovation, Universities and Skills
- EWL: Elderly Welfare Law
- FE: Further Education
- HE: Higher Education
- KIG: Korean Institute of Gerontology
- KNSO: Korea National Statistical Office
- KOPA: Korean Older People Association
- LEL: Lifelong Education Law
- LSC: Learning and Skills Council
- MoE: Ministry of Education
- MoEHRD: Ministry of Education and Human Resource Development
- MoEST: Ministry of Education, Science, and Technology
- MoGAHA: the Ministry of Governmental Administration and Home Affairs
- MoWH: Ministry of Welfare and Health
- NIFLE: National Institute for Lifelong Education
- NIACE: National Institute of Adult Continuing Education
- SU: Senior University

CHAPTER ONE: INTRODUCTION

1.1 BACKGROUND OF THE STUDY

Faure et al. (1972) highlighted the importance of continuous learning for allowing people to live productively in their working adulthood and beyond into retirement. Three concepts are perceived as fundamental to the existence of a learning society: 'vertical integration', 'horizontal integration', and the democratisation of the education system. Vertical integration is concerned with learning continuously through all phases of life (also called lifelong learning), which applies to both the young and old population. Horizontal integration is concerned with the equal importance and need for learning in formal, informal and non-formal settings (also called lifewide learning) (Findsen, 2005, p. 18). 'Lifelong education' has been described as early as 1965, in a recommendation of the International Committee for the Advancement of Adult Education of UNESCO:

> *UNESCO should endorse the principle of 'lifelong education' ….*
> *which may be defined briefly as 'the animating principle of the*
> *whole process of education, regarded as continuing throughout an*
> *individual's life from his earliest childhood to the end of his days*
> *and therefore calling for integrated organisation…to be achieved*
> *vertically through the duration of life and horizontally to cover all*
> *the various aspects of the life of individuals and societies*
> *(UNESCO, 1965, p. 8).*

The widespread concern for lifelong education during the past 50 years has certainly led to a broadening of learning opportunities for older people. Alongside the concept of lifelong education, the practical impacts of learning for older people have been recognised in terms of the wider benefits of learning. According to Laslett (1996), while exercise and diet are necessary preventive health factors for older people, the benefits of engaging in cognitive challenges are also apparent. Schuller et al. (2001) enumerated the advantages of learning in four different categories: physical and mental health; intellectual stimulation, competence and skills; quality of life, empowerment and self-confidence; personal and social

values and networks. Learning can greatly ease the onset of ageing for an individual and can actually improve one's health and well-being. Learning stimulates the brain, which further enables the performance of other important roles, such as serving as community volunteers, grandparents, and carers (Davey and Jamieson, 2003). People with the passion for relentless learning have a more active social life as they are more immersed in the affairs of their own community (Dench and Regan, 2000).

The growing attention to lifelong education among the older population, learning in the 'third age' as it has become known (Laslett,1996), is due in major part to the demographic trends affecting the developed world, and much of the developing world, during the last century. Medical successes in the early part of the twentieth century over infant and childhood diseases resulted in dramatic increases in the number of adults reaching maturity. Moreover, advances in medical technology in the second half of the century have extended life expectancy in the middle and later stages of life. Of course, these two developments continue to have a widening influence of population change across the world today, and for the future. Increased health and longevity have usually been associated with a decline in birth rate, so that many countries are experiencing a dramatic demographic shift towards an 'ageing population' (Evandrou, 1997).

According to the standard definition of the United Nations, societies where the proportion of the population aged 65 and over is greater than 7 per cent, 14 per cent, or 20 per cent are called 'ageing societies', 'aged societies', or 'super-aged societies', respectively. Korea[1] entered the stage of being an ageing society in 1999. In less than twenty years (before 2020), Korea is expected to become an aged society, (KNSO, 2005b). The UK became an ageing society in 1929 and an aged society in 1976 (earlier than Korea by forty-two years), and it is projected to become a super-aged society by 2021.Whilst a few decades ago Korea had the

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[1] Throughout this thesis, for sake of brevity 'Korea' will be used in the text to mean 'South Korea'.

youngest population among the OECD countries, the country is undergoing a rapid ageing process, as a result of its rapid pace of economic development. Korea is likely to experience one of the most rapid demographic transitions from an ageing to an aged society. This phenomenon, which Jaegwan Byun (2004) has called 'intensive ageing', does not provide enough time for a society to prepare for the demographic and social changes that will occur. Effective government and community-based action is likely to be a critical factor for dealing with the phenomenon.

There are conceptual changes that mark the life of retirement and its transitions. Peter Laslett, in the book "*A Fresh Map of Life*" (1996), describes the recent demographic and sociological changes in terms of the emergence of a new 'Third Age'. Laslett notes that, until the twentieth century, the majority of adults lived their lives in 'second age' by working and caring for their family, before they eventually reached a usually short period of dependency, decrepitude, and death. Through the twentieth century major changes occurred as states introduced mandatory retirement, the provision of state-funded pensions, and increased life expectancy resulting from better (often state-funded) health care, People from industrialised countries began to experience a 'third age': a healthy, active and satisfied life and a period of personal fulfillment, that follows the second age of life (independence, maturity and responsibility), and precedes the last stage of dependence, decrepitude and death.

In simple terms, the three 'ages' can be summarised as: Youth must be spent on learning, adulthood on work, and old age on leisure (Cross, 1981). However, the significant and ongoing improvements in the health conditions of the elderly have changed this traditional expectation of the lifecourse, so that a 'blended life cycle', which combines and spreads learning, work, and leisure over the whole course of life, is becoming the expectation. Bronte (1993) suggests that the increasing life expectancy has resulted in a 'second middle age' ranging from 60 to 75 years of age, where individuals choose to live their lives in a variety of ways, that is, some might decide to perform 'bridging' jobs to facilitate the transition from full-time

employment to retirement or settling down, instead of an immediate move from work to retirement. Volunteering, socialising, and taking part in recreational and cultural gatherings are also important options for older people. Within and alongside these activities, education is not a once-only chapter of one's life but a continuous, repeating, and lifelong thread of learning experiences. Despite the increasing importance of older people's learning, policy initiatives linked to the idea of a learning society have tended to focus on groups that are perceived to be economically significant - such as young adults, and the unemployed who are in need of vocational training. In a similar way, those policies on learning in relation to an ageing population have made reduction of old age economic dependency a key consideration. Policy reports on the ageing population have generally focused on recurrent education through which the younger segment of aged people could opt to stay in their jobs, or to re-enter the work force. As of this writing, very little has been published about how learning opportunities can be expanded to support learning as a form of social inclusion that greatly benefits individuals, and society as a whole.

Despite politicians showing indifference to the general education of older people, various learning programmes for older people have been developed in many countries in the non-statutory sector, focusing on non-credit learning and the academic development of older people. One of the largest non-credit learning institutions for older people in the UK is the University of the Third Age (U3A), which was established in 1981 to provide general education services for older people. Its counterpart in South Korea is the Senior University (SU), which was created by the Korean Older People's Association (KOPA) in 1981.

Currently, there are 826 U3A local groups with 273,141 total members in 2011 (U3A webpage http://www.u3a.org.uk). U3A has 33 regional or area networks and 40 subject networks. Midwinter (2005) estimated that there are 14,000 interest groups (i.e., individual study meetings) in U3A's weekly operation. In Korea, 321 groups nationwide comprised the SU in 2011 and there are 13 Senior Leader University (KOPA webpage http://www.koreapeople.co.kr/).

In the case of U3A, it makes use of two models which are well recognized worldwide: a French model and a British model. The former is a university-led academic type of approach whereas the latter is an independent self-help model. The origins of the French universities of the third age can be traced back to Toulouse in 1973. They catered to people in retirement by enabling them to pursue non-credit courses in the humanities and natural sciences at established universities. The idea was rapidly adopted in France, Belgium, Switzerland, Poland, Italy, and Spain. It also spread to North America at Sherbrooke in Quebec and San Diego in California. Further to this, the International Association of Universities of the Third Age (AIUTA) was set up in 1975 (Swindell and Thompson, 1995). A significant change in the format of the U3A took place in Cambridge, UK in 1981 (Midwinter, 2005). Instead of depending on the goodwill of universities, the pioneers of the British model implemented a strategy that barely delineates the relationship between teacher and students. Without relying on the traditional university system and governmental support, members are deemed both as students and teachers as they exchange knowledge, ideas, and skills training with each other. This strategy is called a 'self-help' model, a substantial rationale of which was provided by Laslett (1996). The self-help approach to the U3A has been considered successful in Britain, as well as in other countries such as Australia and New Zealand.

Two models of U3A have become well-known, but they focus on the management perspective, and differing on the issue of whether or not the government should support the U3As. It is necessary that these models should be analysed from multi-dimensional perspectives, which includes the development trajectory, current management style, teaching and learning pattern and curriculum, and participant experiences. In addition, these models need to be reviewed in light of theories of comparative educational organisations.

1.2 THE PURPOSE OF THIS STUDY AND THE RESEARCH QUESTIONS

The main objectives of this cross-cultural study are to understand the teaching and learning of older people in different cultural settings; to examine the characteristics of the third age non-credit education from multi-dimensional perspectives; to explain the cultural meanings of the differences in older people's learning between the UK and Korea, and finally to suggest how to develop learning of older people in Korea as a result of considering the cultural differences. In the context of a learning society that is ageing, understanding older people's learning experiences and knowing their self-perceptions of learning experiences is of paramount importance. As a comparative basis for the study, two models of third-age institutions each in UK and Korea were studied. U3A is a non-credit learning institution for older people in the UK, established since 1981. Its counterparts in Korea, the SUs, are run by various organisations but for this particular study, the SU run by KOPA (Korean Older People Association) was chosen. There are four reasons why the KOPA SU was selected as U3A's equivalent despite the fact that it does not make use of the title, 'third age': first, it is only for older people; second, it is only for the purposes of learning; third, it is an independent organization in the voluntary sector, not run by the government; and finally, KOPA is a nationwide organisation, and thus, the relationship between the headquarters and the local branches can be feasibly examined.

The detailed research questions for this study are as follows:

1. What are the differences and similarities of the older people's learning experiences in non-credit educational organisations for the third age in the UK and Korea? What are the characteristics of learning in U3A in the UK and the SU in Korea?

   1-1. What are the differences and similarities in the development of each institution? How far can these be explained by cultural differences between the two countries?

   1-2. What are the differences and similarities in the management of each

institution? How far can these be explained by cultural differences between the two countries?

1-3. What are the differences and similarities of the teaching and learning practices of each institution? How far can these be explained by cultural differences of the two countries?

1-4. What are the differences and similarities of the experiences of participants in each institution? How far can these be explained by cultural differences of the two countries?

1.3 THE MEANING OF CULTURE IN THIS STUDY

The basis for the meaning of cultural differences in this study is the following. As a cross-cultural study, it is assumed that each country has a different dominant culture that stems from different histories, attitudes, values, norms, economics, and social environment, while recognising that there are many subcultures existing within the country as well.

Culture may be defined as "an organised body of rules concerning the ways in which individuals in a population communicate with one another, think about themselves and their environment, and behave towards one another and toward objects in their environment" (Levine, 1982, p. 4). Similarly, Ogburn (1922) elaborates upon the meaning of culture as the whole gamut of ideas, values, knowledge, aesthetic preferences, rules and customs which are collectively shared. In this study, 'culture' is defined as the enduring sets of beliefs, values, attitudes, and ideologies which provide the underpinning structures, processes, and practices for third-age educational organisations, with particular reference to the two countries, United Kingdom and Korea.

Cultural explanations for the differences in institutions (historical development, institutional management, approach to learning and teaching, and the experience of participants) should start with the historical-political analysis of welfare, followed by cultural approaches to adult learning and teaching, and the socio-

economic backgrounds of participants.

In the UK, the start of U3A can be associated with changing political attitudes towards national welfare in the late 1970s. The UK had been one of the earliest Western countries to establish its national welfare system (following the Beveridge Report in 1942). When it came into power in 1979, the government led by Margaret Thatcher began to shift national policies from state-based welfare towards neo-liberalism, a shift which was argued for as a way of dealing with the critical economic situation in the UK at that moment. It was in the throes of such radical policy transitions that self-help movements started to flourish in the beginning of the 1980s. U3A was one of these self-help organisations which developed to become a major provider of education services for older people, whilst government provision for this age group was declining (for a more detailed account of the origins of U3A, see Chapter Six).

Historically, there have been two versions of self-help movement. Originally, self-help movements started among working class people, whose aim was to secure some measure of personal and social advancement through mutual aid, and this had some characteristics of communitarianism as well as individualism. However, the middle class enthusiasm for self-help emerged later and this was based on individualism, and mostly contrary to the ideas of collective responsibility for social life. U3A embraced two features at the same time: the mutual-aid spirit of the marginalised people in society, and the self-independent spirit of the middle class. U3A draws on the tradition of liberal education for adults which has a minimal emphasis on assessment, an independent curriculum, and a focus on non-vocational education. This is termed the 'andragogical model' in this study.

In the case of South Korea, economic development was the ultimate priority in the 1960s, following the Japanese colonisation period and the Korean War. At this particular time, the specific needs of older people hardly received government attention. KOPA (Korean Older People Association) was formed in 1969 as a social movement for the elderly in Korea. As it developed, KOPA tried to gain

more support from the government, and the SU started as a new branch of KOPA in 1981, with partial financial support from the national government, supplemented by membership fees. The dependence of social organisations on governmental support, which is unusual for most countries, can be attributed to the strict governmental regulation on educational organisations that existed at that time in Korea. In the 1960s, 1970s and 1980s, when Korea was under military power, the government prohibited non-formal or informal educational organisations from offering social or liberal education. All learning institutions had to be registered at a governmental office, which implied that the government controlled such institutions. Working within this system, the KOPA utilized its political connections to expand its scope of business and activities. Unlike the informal style of U3A, SU developed a rigid school-like format, which I will term the 'pedagogical model'. This term will be used to describe the perspective of institutional management as well as the value attached to, and attitudes towards, teaching and learning. There are two further reasons why a formal school-like approach is preferred in the realm of informal learning in Korea: first, schooling is greatly valued in Korean society as a powerful means for social mobility; and second, the ethical standards of Confucianism are deeply rooted in Korean culture, which gives significant attention to hierarchy and structure; hence, the need to have a rigid difference between teachers and students, and the curriculum being pre-determined by professionals, not the students.

1.4 THEORETICAL FRAMEWORK FOR COMPARATIVE STUDY

I have outlined the theoretical framework for this study in detail in Chapter Two. The framework draws upon four domains focusing on organisational comparison and learning in later years: the theory concerning multi-level and broad-based comparisons; classifications of teaching and learning and management style; participation theory; and the critical view of teaching and learning. Theories of ageing and lifelong learning are examined in Chapter Four as part of the discussion of the background to this study.

Firstly, from the perspective of comparing organisations, this cross-national study between UK and Korea combines two models of comparative studies. The first is G. Z. F. Bereday's (1964) systematic approach to comparative education. The second model is a multi-faceted analysis based on 'the cube' as proposed by Bray and Thomas (1995). Bray designed this method to illustrate how three dimensions (location, non-location, and the aspect of education) could be integrated to promote the understanding of wider structures and contexts. Secondly, for the organizational analysis, this study draws on a broad-based institutional investigation method by Ronald J. Manheimer (1995). Thirdly, this study has adopted the dimensions of andragogy and pedagogy proposed by Knowles (1980) to examine the differences of teaching and learning in third age organisations. For the differentiation of management style, this study used two classifications: bottom-up and top-down. Fourthly, in order to understand older people's participation in learning, this study used Cross' (1981) Chain-of-Response (COR) model to discuss how older adults might be influenced to participate in U3A or the SU. This model assumes that participation in educational activities, whether in an organisational setting or self-directed, is not a single act but results from a chain of responses. I selected the COR model as it provides a comprehensive perspective and outlines multiple factors which may affect the participation of U3A and SU members. Finally, I highlight the critical perspective that to understand learning and teaching among older people it is necessary to understand the inequalities that exist, and the socio-economic factors for inequality.

1.5 RESEARCH DESIGN AND DATA COLLECTION

This research was carried out in two different phases, within a comparative framework. In the first phase, the literature related to the learning and ageing of older people was examined to explore the contextual factors that affect the learning experiences of older people. Four major areas of study were selected: recent literature on learning policy and the learning society; policy and literature on provisions and participation of older people in learning; literature on the changing conception of third age; and literature and policy about demographic

change. These four areas were chosen because they provide the critical information about the relationships between learning and ageing. In the second phase, in order to understand the characteristics of the educational institutions of older people in the two countries, quantitative and qualitative methods were used to describe differences in the experience of participants and the development of each institution, and to analyse these in terms of the different cultural meanings attached to learning in the two countries (Evans, 2001).

1.6 OUTLINE OF THE THESIS

This thesis is organized into nine chapters. Chapter One provides an introduction to the study and outlines its background, research questions, theoretical framework, research design, significance, and limitations. Chapter Two examines the theoretical framework for comparing educational organisations between two countries. Chapter Three, which describes the methodology, provides a description of the data collection, the process of research, analysis of the data, back translation, and the ethical protocols that have been followed. Chapters Four and Five explore the background of this study. Chapter Four reviews ideas and attitudes about lifelong learning, the benefits of learning, the phenomenon of ageing, and the changing conceptions of the 'course of life'. Chapter Five examines the current policy situation, wherein the interests of older people have been under-represented in learning-oriented policies. Chapters Six to Eight summarise the institutional characteristics of the U3A and SU, and their members' attitude towards learning and towards other related institutions; these analyses are based on structured interviews and questionnaires completed by institutional representatives. These chapters further explain the cultural meaning of the empirical findings. Chapter Nine summarises the main arguments developed in the previous chapters and outlines the main empirical findings of the fieldwork. It also includes discussion and suggestions for the development of learning organisations and policy for older people in Korea.

1.7 SIGNIFICANCE OF THE STUDY

The research holds much importance and relevance as it carries great potential to

help academics and policy makers to understand the learning phenomena of older people and to plan future strategies for an ageing society. This is especially important at a time when in both countries recent government initiatives indicate a growing realisation that access to learning opportunities may also offer wider non-economic benefits.

Furthermore, with the limited availability of comparative studies of educational gerontology, in particular between Western and Eastern countries, this study can contribute to the development of models of third age learners which take account of cultural differences. The study highlights that older people's approaches to, and interests in, learning are far wider and varied than those of the young generation, and no single model can address the diverse interests, abilities and access to learning options for all third-age people. Moreover, this study ventures beyond the scope explored in the case study-based report 'An International Perspective of the University of the Third Age' (Swindell and Thompson, 1995) which provides information from various universities of the third age around the world. This study thus stands significant in terms of methodology in that it examines third-age universities using a theoretically-based comparative framework for systematic and multi-dimensional comparison.

The study also informs about the cultural meanings of learning of older people in the two countries, and will therefore be of interest to practitioners and learners in third age organisations.

1.8 LIMITATIONS OF THE STUDY

The major limitation of this research lies in the comparison of adult education systems, because this type of education system is not as formal and systematic as can be examined in school or university settings. One consequence of that was that it was difficult to choose a counterpart to the U3A in Korea because there are no senior institutions of the same type as U3A. There are several types of SU in Korea run by different organisations, and the one operated by KOPA was selected

for the reasons stated in section 1.2. Finally, there are limitations to the generalisation of this study because only three institutions within each country were selected for detailed study. Therefore, care is needed in drawing inferences from the results of the study about all the cases of U3A, SU or other third age learning organisations in each country. In particular in Korea, the SU institutions sampled were only those operated by KOPA, not by any other organisations.

CHAPTER TWO: A THEORETICAL FRAMEWORK FOR COMPARING THE THIRD-AGE LEARNING INSTITUTIONS OF THE UNITED KINGDOM AND SOUTH KOREA

2.1 INTRODUCTION

This chapter develops the theoretical framework deployed in the comparative examination of third-age educational organisations. The framework draws upon four domains that are relevant to organisational comparison and to learning in later years. These are: theory concerning multi-level and broad-based comparisons of educational institutions; classifications of teaching and learning and management style; participation theory; and the critical view on teaching and learning. Each domain will be explained separately with reference to its significance for the purposes of this study.

The next section of the chapter will reveal how, in order to operationalise a more active and detailed comparative study, this study combined two key models: the systematic approach advocated by Bereday (1964), and the multi-dimensional analysis of Bray and Thomas (1995). Along with this combined approach, the study utilizes the method of broad-based investigation, advocated by Ronald J. Manheimer (1995), whose taxonomy is divided into two groups: the management of institutions, and institutional learning and teaching approaches. It is noteworthy that for developing a questionnaire to examine and compare the educational organisations, the items from Manheimer's model were adopted, and for developing a second questionnaire to examine participants' experiences in two different settings, items based on Cross' Chain-of-Response (COR) model (1981) were developed. Regarding Manheimer's taxonomy, the differences in management and in approaches to teaching and learning of the two institutions will be analysed in light of cultures of ageing and learning. Various other

classifications of learning and teaching, and of management styles, will be analysed in the same way. Finally, critical views on teaching and learning of older people, termed as critical geragogy or critical educational gerontology, will be reviewed bearing in mind that such critical perspectives on learning and teaching are necessary to understand inequalities among older people, and the educational characteristics that are affected by socioeconomic factors.

2.2 A MULTI-LEVEL AND BROAD-BASED COMPARISON OF EDUCATIONAL ORGANISATIONS

Bereday (1964) begins his approach to comparative education by dividing the field into area studies and comparative studies. An area study deals with one country or region, and a comparative study deals with many countries or regions at the same time. He then suggests that each field may be further subdivided. Area studies may be divided into descriptive and explanatory (or interpretive) phases while comparative studies may be divided into phases of juxtaposition and comparison. Area studies are composed of description (the collection of purely pedagogical data) and explanation (the application of the methods from within social sciences to interpret the pedagogical data) but comparative studies involve a four-phase sequence: beginning with the description and explanation, and then juxtaposition (the preliminary confrontation of data from different countries for the purpose of establishing the criteria for comparison) and finally comparison (simultaneous analysis of data from different countries).

Bereday's model was selected for this study because it is systematic, interdisciplinary, simultaneous and problem-based. Bereday's model is similar to that of Holmes (1961). It also adopts the problem-based approach, involving the selection of a single theme or topic for analytic comparison. According to Bereday, an area study is within the ambit of comparative education. It facilitates a more profound comprehension of a single society and its educational system, although others argue that this is just an initial step necessary in a comparative study. Holmes concurs with Bereday, asserting that "in spite of the fact that area studies

might appear to lack the element of comparison, they should be accepted as not only leading to a greater understanding of an area but as a contribution to the improvement of the method" (Holmes, 1961, p. 8).

The model raises a number of problems when implemented. In area studies, for example, the separation of description and interpretation becomes unrealistic in many cases, though it does emphasise the need to gather accurate data and to move beyond description to explanation (Tretheway, 1979, p. 75). Further, it is doubtful whether any researcher should be recommended to follow Bereday's sequence rigidly, moving from one step to another without going back over earlier ground to make several iterations.

Nevertheless, Bereday's model is useful for three reasons, as summarized by Bray (2004): first, it highlights the importance of systematic and balanced inquiry. Second, it views educational experiences from a far-reaching perspective, and third, the model allows for a profound comparison in determining the scope and basis of the similarities and differences and the concomitant cultural meanings, as well as contributing to a conceptual understanding of the global changes and local continuities in adult education.

This study also made use of the type of multi-level analysis advocated by Bray and Thomas (1995). They argue that conventional studies in comparative education are overly focused on regional and cross-country research, which leads to an incomplete and unbalanced approach as it ignores the salient distinctions among individuals, classrooms, schools, districts, and states. Thus, most studies do not tackle the ways in which lower level patterns in an educational system are influenced by higher level patterns, and vice versa. Though they further argue that the available goals and resources in some comparative research must lead inevitably to having a limited scope, it is recommended that such studies must still at least take into account the mutual influences and boundaries of other levels. Bray and Thomas (1995) formulated the strategy of integrating the three dimensions of location, non-location, and education into the broader understanding of the prevailing structures and contexts. They argue that the role of

multi-level analysis for certain inquiry types has received considerable attention, citing the remarks of Sellin and Keeves:

> *Formerly the issue associated with the appropriate level of analysis was considered to be influenced largely by the nature of the research questions to which answers were sought, for example, whether the problem was concerned with individual students or with classroom groups, as well as by the level at which sampling had taken place and at which generalisation to other situations was sought. More recently it has become apparent that a multi-level analysis strategy is required if appropriate answers are to be obtained (Sellin and Keeves, 1997, p. 690).*

Common research studies, however, are limited to the level of individual, classroom, and school, thereby neglecting the levels of state or province, country and global or regional perspectives. This creates unbalanced and incomplete interpretations, albeit more informative than before (Bray and Thomas, 1995).

The strong point of 'upper level' studies is that they provide a general framework, wherein specific details can be placed. Such frameworks may serve as a foundation for understanding and interpretation, while helping to avoid the peril of research that bombards the audience with too much information. Studies at the upper level also are able to identify economic settings, political configurations, cultural traditions, and educational institutions as influential factors that determine the type of education being provided in various sectors of society. With regard to the weak point, on the other hand, of upper level studies it is that generalizations compromise the distinct qualities of each pupil, school or region. Macro-level research fails to acknowledge individual differences and their implications for educational events.

Evans (2001) notes that 'layered designs' – involving the comparison of cases and categories at various levels as a tool of data analysis – can actually go beyond the probing of hypothesized similarities and differences. A multi-level analysis is necessary in order to achieve a balanced understanding of the topic of research. Macro-level studies bring the context of the research into the analysis, while

micro-level analysis takes into account individual differences, thus controlling for the risk of over-generalization.

Dimmock (2007) argues that there is a need for a perspective that takes account of the multiple levels of the environment within which educational organizations function, that allows for dynamic interdependent relationships between the levels, and that facilitates studying the deeper, less formal and more subtle features of organizations beyond simply examining the formal and surface structure. He suggests that in an organisational comparison, four aspects are to be considered and analysed: organisational structures; leadership, management and decision-making processes, and the degree of centralization; the curriculum; and teaching and learning.

The multi-dimensional analysis carried out in this study adopted the method of broad-based investigation advocated by Ronald J. Manheimer (1995). He argues that there are few broad-based investigations of programmes and institutions of older learners, while programme descriptions, single-focus studies of particular programmes, and general research on the benefits of education for seniors are increasingly available. Manheimer (1995) formulated a taxonomy of critical pathways having fifteen stages (see Table 2-1), derived from David Peterson's (1983) fifteen planning phases of educational programmes for older adults. With his taxonomy, Manheimer investigated newly emerging programmes for older learners and the organisational forms these have assumed in the USA. This model was adopted for this study because it seemed useful for producing a broad comparison between institutions and programmes.

Table 2-1 Critical Pathways Taxonomy: Fifteen Stages

1. Inception: origin of the programme and institutional goals and motivations;
2. Assessment: determination of the need, desire, and feasibility of the programme;
3. Planning: method of planning, make-up, and authority of planning committee;
4. Organisational positioning: administrative placement in host institution;
5. Rationale: justification, benefits, mission and purposes of programme;
6. Funding and resources: expenses, revenue sources, and institutional support;
7. Participation: targeted population, socio-demographic characteristics, and degree of inclusiveness;
8. Governance: representation and method by which programme direction is decided;
9. Programme content and pedagogy: curriculum design, staffing, and teaching method;
10. Strategy: short-term or long-range focus and societal impact;
11. Scale: goal for size of programme, number of programme units, involvement in community, and intergenerational projects;
12. Delivery: location and number of sites, co-sponsors, and use of direct learning technology;
13. Evaluation: criteria of success and procedures for assessment;
14. Continuity and growth: growth goals, size limits, and institutional development;
15. By-products: publications, exhibits, recognition events, and new programmes.

(Source: Manheimer, 1995, p. 88)

2.3 CLASSIFICATIONS OF APPROACHES TO TEACHING AND LEARNING, AND MANAGEMENT STYLES OF EDUCATIONAL ORGANISATIONS

Within the broad framework of learning, this study adopts the dichotomous dimensions of andragogy and pedagogy as proposed by Knowles (1980) in examining the different characteristics of teaching and learning as well as management in educational organisations.

According to Jarvis (1985, p. 3), learning operates in three major contexts. These comprise informal learnng, or the process in which a person acquires knowledge and skills from his/her daily experiences; non-formal learning, which refers to some systematic and organized form of educational activity that takes place outside the formal system and caters to specific groups of learners; and formal learning, which is deemed as an institutionalised system that follows a chronological and hierarchical path.

Since this study focuses on institutionalised learning, the learning activities in this study can conveniently fall within the category of non-formal education. Still, I will use the dichotomy of formal and informal learning to highlight the characteristics of learning in each institution in this study. There is a continuum of formality of learning (or education) in which formal learning is at one end and informal learning is at the other. Hence, I use the terms, 'formal-learning orientation' and 'informal-learning orientation'. The formal-learning orientation refers to practices used by learning institutions to formalise learning activities in terms of venue, time, schedule, the role of teachers and students, and learning materials. Classroom-based formal schools are typical instances of the formal-learning orientation. The informal-learning orientation refers to educational organisations that pursue and encourage informal learning, which is semi-structured and occurs in a variety of places. At institutions which have an informal-learning orientation, the means and modes of learning that stand apart from formalised teaching are considered important aspects of learning, such as

books, self-study, and social interactions among learners, as well as learners' interactions in everyday society.

The distinction between informal learning and formal learning relates to the distinction between the andragogical and pedagogical models of learning. In this study, the informal learning orientation is related to the andragogical model and the formal-learning orientation is related to the pedagogical model, in terms of self-directedness of learners and the role of teacher-dominant instruction. Pedagogy – originating from the Greek word, 'paid' (child) and 'agogos' (leading) – is often referred to as the art and science of teaching children. By this definition, the teacher is fully accountable as to what should be learned, how it will be learned and when (Knowles, 1998). To compensate for the pedagogical model's shortcomings in failing to include the developmental changes taking place among adults, the notion of andragogy was developed, which is understood as the art and science of helping adults learn.

The term 'andragogy' itself was first used by a German high school teacher named Alexander Kapp in 1833 (Knowles, 1989, p. 79). Knowles introduced the concept of andragogy in 1968, the theoretical and practical aspects of which are based on the 'humanistic conception of self-directed and autonomous learners, and teachers as facilitators of learning' (Reischmann, 2003).

Knowles initially stated his theory with four characteristics that distinguish between pedagogy and andragogy, but he later changed his position and added two more characteristics. Robert (2007) summarises the six characteristics as shown in Table 2-2, based on Knowles et al. (1998, p. 64-8).

Table 2-2 Six Defining Characteristics of the Andragogical and Pedagogical Models

Aspect	Pedagogical Model	Andragogical Model
1. The Learner's Need to Know	Learners need to know what the teacher tells them.	Learner needs to know why something is important prior to learning it.
2. The Learner's Self-concept	Learner has a dependent personality.	Learners are responsible for their own decisions.
3. The Role of the Learner's Experience	The learner's experience is of little worth.	The learner's experience has great importance.
4. A Student's Readiness to Learn	Learners become ready to learn what the teacher requires it.	Learners become ready to learn when they see the content as relevant to their lives.
5. The Student's Orientation to Learning	Learners expect subject-centred content.	Learners expect life-centred content.
6. The Student's Motivation to Learn	Learners are motivated by external forces.	Learners are motivated primarily by internal forces.

(Sources: Robert, 2007, p. 19; Knowles et al., 1998, p. 62-68)

According to Foley (2001), the emergence of the concept of andragogy was driven by the paradigm shift in educational experience from being teacher-centred to learner-centred. Such developments took place (in the UK) in the 1960s and 1970s amid dissatisfaction over prevailing teaching methods. Foley sees the transition towards a new model of learning as an attempt to assume control over education. This kind of shift was further impacted by the twentieth century movement of an independent working class in England, seeking for gender equality and access to quality education for all.

Knowles (1989) compares the assumptions of the "pedagogical model"- which he considers to represent conventional educational ideas and practices - with his andragogical model. He emphasizes that learners only need to know that they must learn what the educator teaches under the pedagogical model, whereas the andragogical model asserts that adults first need to be aware of their intrinsic desire to learn something before actually trying to learn it. Knowles et al. (1998) assert that the distinction between andragogy and pedagogy is not necessarily mutually exclusive. Even teachers using the pedagogical model can benefit from employing some aspects of the andragogical model (Knowles et al., 1998, p. 70).

Roberts (2007, p. 20) explains that the andragogical model has many strengths, chief among them is its flexibility, broad applicability, the ability to take into account the perspective of the learner, and cohesiveness with other learning theories. The pairing of andragogical model and pedagogical model also has a similarity with Sunghee Han's (2002a) terms 'educationism' and 'learningism', where educationism is similar to pedagogy and learningism to andragogy. In this, educationism refers to the traditional concept of education, which is focused on school education with teachers who pass knowledge to the students. It also implies a set of ideas that education is a department of government, that only government can manage education; that education happens through a formal school system, and that educational opportunities are limited or cannot be given if one fails at school.

In contrast, learningism represents a strong focus on individual learning in every part of life rather than only in school-oriented education. Learningism could thus be perceived as a new concept whereby the role of a nation and government is changed from distributing knowledge through the school system to supporting or encouraging individual learning. The place of the learner is changed from passive receiver to active or independent learner. In such a 'learning society', educational opportunities get extended beyond compulsory education and learning may happen without teaching where learners can choose to learn when they want or where they want.Thus, the andragogical learning model highlights a need for learners to have some ability as facilitators of others' learning, that is, enabling others to realise their capacities by identifying needs, encouraging learning, offering resources, and assisting other learners in measuring outcomes (Knowles, 1998).

The application of the andragogical model has invited much criticism. First, the pedagogical-andragogical dichotomy formulated by Knowles has a tendency to strengthen the andragogical model at the expense of the pedagogical model, leaving little positive impression about the traditional educational theories and practices (Bae, Y., 2005). Second, Reischmann (2003) has criticised arguments in

favour of the andragogical model for being too general and descriptive. Third, from experiential evidence it may be seen that adults have different orientations and behaviours with regard to learning; some rely heavily on teachers while others are independent and self-directed. Adults may either be motivated internally and externally or they might lack sufficient motivation for learning. Bae (2005, p. 6) argues that self-directed learning as a method for adult learning based on the andragogical model must reflect not only the variety of adult learners' affective and cognitive traits, but also the social backgrounds of adult learning.

Using the above discussion as guiding points, this study employs the models of andragogy and pedagogy to differentiate the learning characteristics of two educational organisations: U3A and SU. Out of the six assumptions described above, this study emphasises that the concept of andragogy rests on two points (Merriam, 2001). First, the student is self-directed and independent, and second, the teacher's role is to facilitate the learning process.

Also using the models of andragogy and pedagogy, this study discusses the management aspect of learning organizations with reference to two styles: 'top-down hierarchy' style; and 'bottom-up democratic' style. Below, these are introduced in more detail.

Researches and theorists of adult education have used various terms to describe approaches to teaching: teacher, instructor, helper, group leader, facilitator, consultant, broker, change agent, mentor, master, provocateur, and animator. They have also used metaphors to explain the nature of the job of adult educator such as: travel guide, maestro of an orchestra, midwife, gardener, artist, and challenger (Choi, 2009). In this study, for examining the relationship between teachers and students, two different categories of relationships are used: vertical teacher-student relationship and horizontal teacher-student relationship. In the latter category, teachers may be called tutors, group leaders or facilitators, who typically set a climate for adult learning, have participants formulate their learning objectives, and plan experiences to accomplish those objectives. The viewpoint of

facilitation and horizontal relationships can be juxtaposed with the didactic teaching method: that is, teaching is the way of transferring knowledge in the didactic mode. Knowles (1998) has written that the conventional teaching model involves transmitting the necessary content and controlling how students receive the information. It is also characterized by highly didactic procedures and authoritarian directives.

In formal education, curriculum means a set of courses offered at a school or university. As defined from its early Latin origin, the word 'curriculum' means literally 'to run a course'. Oliva (1997) provided several definitions of curriculum: it is a set of subjects taught in school; a programme of studies or set of orderly arranged course materials; a set of performance objectives; and (in the broadest sense) it can be used to describe a collection of experiences or activities planned by the school personnel for the learner, even including guidance and interpersonal relationships. Types of curriculum are classified under various labels: overt, explicit or written curriculum; societal curriculum; hidden or covert curriculum; null curriculum; received curriculum; and electronic curriculum.

In this study, the term curriculum will refer to a set of courses or subject-specific content wherein the type of curriculum signifies the purpose for which the courses or subject specific content is organized in a particular way. The two main types considered are the 'buffet style' curriculum and the 'course menu' style curriculum. The buffet style curriculum means that students can choose freely from an array of activities or subjects made available to them. The course menu style curriculum means that students can choose from pre-designed sets of courses in which subject combinations are constrained.

Finally, the study looks into organizational analysis through the lens of two management styles. Top-down management is a management structure in which there is a headquarters which controls or enjoys a dominant influence over local branches; typically, managers are appointed directly with or without relevant experience but with specified qualifications. The bottom-up management style is

where local branches are run with independent control, although in cooperation with a headquarters to some extent; and typically managers are appointed on the basis of experience much more than from their qualifications.

2.4 PARTICIPATION THEORY

There are two major kinds of participation research. The first kind uses the psychological model of behaviour to understand the motivation behind an individual's willingness or reluctance to participate. The second type of participation research makes use of sociological approaches which seek to understand participation in the context of social groupings and functions (Benseman, 1996, p. 296). During the 1970s, much of the research literature (mainly American) had a psychological focus, looking at the issues of the preferences of older people for 'instrumental' or 'expressive' education and their needs, wants, and goals (Benseman, 1996). There has also been a body of literature that takes a sociological approach to look at the underlying social reasons behind people's participation in education and the 'barriers' and 'deterrents' that prevent them from doing so (Findsen, 2002).

My study adopts the Chain-of-Response (COR) model by Cross (1981) as a combination of psychological and sociological approaches, to explain the participation of older people in their learning. Later, in Chapter Eight, I analyse the results of a participation survey in terms of social backgrounds and sociological factors. According to Cross (1981, p. 125), one's involvement in a learning activity is not a single act but a manifestation of a series of reactions grounded in the assessment of one's individual position in his/her environment. The COR model was chosen since it fits the needs of this study being able to offer holistic viewpoints and diverse features affecting the involvement of U3A and SU members in learning. Moreover, for this study six factors have been highlighted which affect the adult's participation in learning, namely: self-evaluation (point A); attitude about education (Point B); importance of goals and expectations that participation will meet (Point C); life transitions (Point D); opportunities and barriers (Point E); and information (Point F).
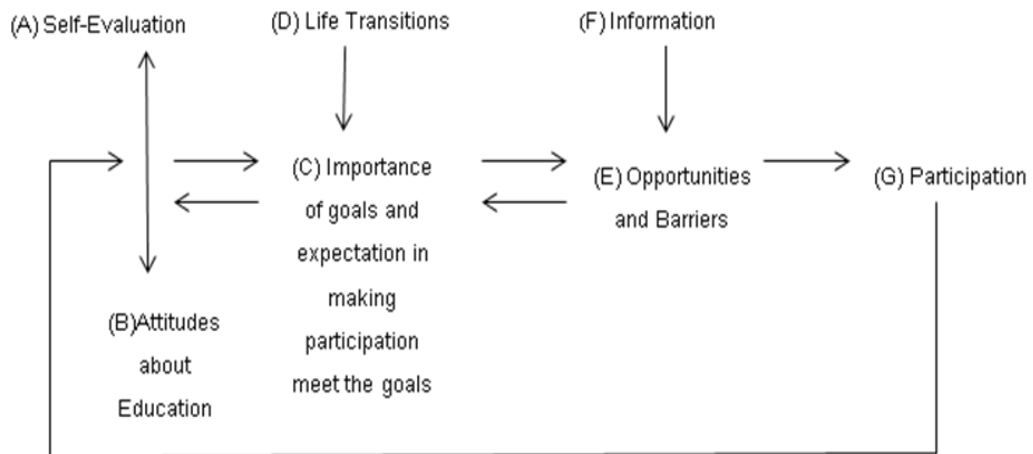
Figure 2-1 Chain of Response (COR) Model for Understanding Participation in Adult Learning Activities

At point A, an individual conducts self-assessment and this process of perceiving one's self is critical for future decision-making. Point B concerns the individual's attitude towards education. Point C highlights the value of goals and the possibility of achieving them. The significance of the goal and the reward to be gained will motivate the individual to engage in the learning activity. At point D, major life changes can have enormous impact such as divorce, new employment opportunities, death in the family, health problems, etc. Such circumstances are supposed to unleash one's determination for education (Cross, 1981). Point E concerns the significant role played by the hindrances and the opportunities for adult learning once the individual becomes driven to learn. Lastly, Point F pays attention to access to information as a factor that connects potential learners with educational providers.

I used Cross's model to explain participation in this study, in the following way: The participants were asked about where they obtained the information about each institution and the educational opportunities. This is basically related to Cross' Point F. In understanding their attitude towards learning, these data are related to Point B. This research also inquired about the benefits that the participants

perceived or experienced, which is related to Cross' Point C. The study also associates Points C and E with reasons for participation and non-participation. When the older people were asked about possible reasons for not joining the learning programmes offered (by U3A or SU), I framed this in terms of all the three aspects of barriers which are proposed by Cross (1981).

These perceived learning hindrances are situational, institutional, and dispositional barriers. Situational barriers arise from one's specific circumstances at a given time such as lack of money (high cost of education, competing costs of child rearing), lack of time (work-family life balance), and the lack of transport. Institutional barriers include some norms and measures that de-motivate adults from engaging in activities, such as problematic schedule or location of activities, inappropriate programmes, and institutional focus on full-time study rather than part-time. Lastly, dispositional barriers refer to those related to attitudes and self-perceptions of the learner such as feeling 'too old to learn', poor self-confidence, and exhaustion from learning. Johnstone and Rivera (1965), have similarly stressed the existence of internal or dispositional barriers, and external or situational barriers.

The validity of the linear sequence of the Cross model has been discussed (Merriam and Caffarella, 2007). The linearity of the model is however helpful to show how the different factors interact to strengthen or weaken the learner's participation. Moreover, the phases of the model can take place simultaneously and elements can be skipped – hence different sequences of development are possible. Also there is discussion about whether the Cross model is based on a Westernised view of the concept of 'self' (Benseman, 1996). However, these two discussions are marginal to this study as it did not follow the linearity of the model. Instead, it considered the comprehensive aspects of the stages prior to participation. Also, the stage of 'self-evaluation' was omitted in this study.

Researchers and academics that deal with broadening learning opportunities for adults, such as Sargant (2000), Dench et al. (1999); Walker (1998); Sargant (1993); and Cross (1981), suggest that tackling the dynamics behind adult

learning participation may focus on finding motivating factors, or finding ways to reduce the effects of hindering factors.

Among scholars who have examined the hindrances that the potential adult learner has to deal with, Merriam and Caffarella (2007) noted that the two most common factors that lead to non-participation are the lack of enough time and money. Valentine and Darkenwald (1990) suggested five barriers as follows: personal dilemma, poor self-confidence, high cost of education, and indifference to the overall educational process as well as to specific learning opportunities.

Learning programmes are commonly categorized as instrumental or expressive. Instrumental learning is defined as "a kind of investment of time and energy in the expectation of future gain" (Havighurst, 1972), while expressive learning means "education for a goal which lies within the act of learning or is so closely related to it that the act of learning appears to be the goal" (p. 17). Expressive learning is associated with self-development and enjoyment. Instrumental learning refers to programmes that are designed to assist learners in facing the basic challenges of old age and to achieve a better quality of life – for example, health and physical fitness, income generation, or security enhancement. Havighurst (1972) and Londoner (1990) argue that expressive education is not essential, but it can allow older people to enjoy life and broaden their perspectives.

Londoner (1990) stresses that older adults must maintain sound psychological and physical well-being to achieve satisfactory social adjustments. The goal for survival actually drives them to cope with their daily problems. Expressive education, on the other hand, deals with the older people's direct fulfilment from the pleasures brought about by learning.

Hiemstra (1991) links instrumental learning to retirement needs, religion, economics and finance, medical care, reading and writing skills, and the ageing process. Expressive learning encompasses culture, arts, hobbies, music, travel, literature, and crafts. This classification is based on his research on older adults'

actual preferences for the design and substance of educational activities. The core of instrumental learning is the empowerment of learners to meet fundamental survival needs and to attain a degree of personal effectiveness and autonomy. Expressive learning, on the other hand, enables learners to meet their needs and goals for identity, affiliation, competence, and participation in productive activities. Also important for expressive learning is the immediate gratification that can be obtained (Hiemstra, 1991, p. 228). The motivational orientation of learners can be divided into four categories, as aptly put by Bynum and Seaman (1993, p. 13). First, people who deal with apparent cognitive gaps are driven to complete their unfinished achievements and to develop their underutilised talents. Second, curious learners pay significant attention to mental encouragement and their inherent learning interests. Third, people who desire to experience self-actualisation are also more likely to enjoy learning for its own sake. Lastly, there are older adults who are looking for social contacts and primarily engage themselves in learning experiences for social satisfaction.

Boshier (1980) stresses that learners are either 'life-chance oriented' or 'life-space motivated'. Life-chance driven learners work to reach the lower order of Maslow's needs hierarchy in order to compensate for personal insufficiencies. Life-space centred learners have mainly satisfied their low-order needs and are set to furnish their life spaces. Life-space oriented people take part in education in order to express themselves instead of trying to cope with basic needs and survival. The degree of motivation of both life-chance or life-space learners changes as people get older and seek to achieve developmental tasks suitable to their culture and social setting.

Withnall (2010) proposes a model of influences on and outcomes of later life learning from the life-course perspective (based on her original model of 2004). She also highlights the importance of historical and social context. Even though this study does not focus on the life-course perspective, the importance of social factors to have an influence on the learning participation of older people is recognised and so the historical and cultural discussions are set out later in

explaining the learning of U3A and SU members. Further theoretical discussions about social factors which affect the learning participation of older people will be examined in the next section.

2.5 CRITICAL VIEWS ON THE TEACHING AND LEARNING OF OLDER PEOPLE

This section highlights the significance of critical perspectives on learning and teaching of older people, in order to grasp the underlying inequalities among older people and the educational characteristics of older learners as they are affected by socio-economic factors.

The teaching and learning theories that are applicable to children and younger adults are different from those applicable to older people. The three approaches to be considered here are pedagogy, andragogy, and geragogy. Geragogy refers to the practical teaching principles and strategies used in educating older adult learners. The line that separates geragogy and andragogy is based on viewing later life as a distinct developmental phase, instead of being an extension of middle age. Older people's capacity to learn may be greatly dependent on the choice of teaching methods and underlying theories, so it is important for educators to tailor the curriculum to make it appropriate to a distinct group of learners (CCCEOA, 2008).

Adult educators have been relatively slow to examine the principles and practices of teaching and learning for the elderly (Formosa, 2002, p. 73), despite the fact that the number of publications on educational gerontology has increased. Formosa (2002) introduced the concept of 'critical geragogy', which is distinct from geragogy and critical educational gerontology (CEG). He criticises CEG as being too abstract or lacking practicality. He proposes that critical geragogy ought to be established independently from CEG, as critical geragogy is a more pragmatic approach to teaching and learning for older people. Formosa describes the difference between the two as follows, presenting educational gerontology as one area of social gerontology. The term 'educational gerontology' originated in

the United States in the 1970s, when Howard McClusky designed a part-taught doctoral programme at the University of Michigan. In 1976, American researchers organised a conference to launch a new journal, Educational Gerontology, and Sherron and Lumsden's book titled "Introduction to Educational Gerontology" appeared. Peterson (1976) defined the subject as:

> *the study and practice of instructional endeavours for and about*
> *aged and ageing individuals. It can be viewed as having three*
> *distinct though related aspects: educational endeavours for persons*
> *who are middle aged and over; educational endeavours for a*
> *general or specific public about ageing and older people;*
> *educational preparation of persons who are working or intend to be*
> *employed in serving older people in professional capacities*
> *(Peterson, 1976, p. 62).*

The three identified domains of educational gerontology are: education for older adults; public education on ageing; and education of professionals and para-professionals in the field of ageing.

Glendenning (2000, p. 80) found definitional problems in differentiating educational gerontology from gerontological education in England. Glendenning noted that the former is "concerned with the education and learning potential of older adults including all relevant aspects and processes" while the latter is concerned with the "education about the realities of an ageing society, and the training of those who wish to work for and among older people, whether they be professional, para-professional or acting in a voluntary capacity. In general terms, this may be described as teaching gerontology". Glendenning's detailed comparison between educational gerontology (learning in later years) and gerontological education (teaching gerontology) is illustrated in Table 2-3.

Table 2-3 Categories of Educational Gerontology and Gerontological Education

A. Educational gerontology		
Audience	Older people and adult educators	Older people: animators, adult educators, (in post or retired)
Study	1. Instructional Gerontology	3. Self-help Instructional Gerontology
Practice	2. Senior Adult Education	4. Self-help Senior Adult Education

B. Gerontological Education			
Audience	Older people and the general public	Professional and para-professional	Professionals, para-professionals and volunteers
Study	5. Social Gerontology and Adult Education		
Practice	6. Advocacy Gerontology	7. Professional Gerontology (professional training)	8. Gerontology Education (in service and post-qualifying training)

(Source: Glendenning, 2000, p. 82)

Educational gerontology consists of:
1. Instructional gerontology e.g. how older people function; memory and intelligence; learning aptitude
2. Senior adult education e.g. enabling older adults to extend their range of knowledge through reflection; curriculum development
3. Self-help instructional gerontology e.g. learning and helping others to learn in self-help mode; relationships in a learning group
4. Self-help senior adult education e.g. learning groups; peer counselling

Gerontological education consists of:
1. Social gerontology and adult education e.g. stereotypes and myths of older people; tutor training
2. Advocacy gerontology e.g. consciousness-raising; discrimination; older people as a mainstream resource in society
3. Professional gerontology e.g. professional training of skilled tutors and practitioners; course evaluation
4. Gerontology education e.g. post-professional training: training of volunteers and community strategies.

In the 1970s, most American academic writing centred on older people's preference between 'instrumental' or 'expressive' education and on identifying

their needs, wants, and goals. Earlier publications also dealt with older people's participation, or the lack thereof, in education and with analyses of the corresponding 'barriers' and 'deterrents' (Withnall, 2002, p. 93). Hiemstra (1991) notes the pioneering role of Howard Yale McClusky in the development of educational gerontology in North America. McClusky's groundbreaking contribution was the notion that education is an optimistic realm and an affirmative enterprise that promotes a better life for participants of lifelong learning.

It is evident that a large proportion of the educational services for older people which exist in Europe and elsewhere operate within a functionalist paradigm and are derived from sociological theories of role change and activity (Withnall, 2002, p. 38). Functionalists highlight the importance of analysing people's roles in social systems, unravelling social networks and probing into the functions of a particular person or group. Making use of this point of view in the case of older adults stresses the value of such elements as role theory and the disengagement hypothesis. In this perspective, retirement becomes a matter of adjustment to a new daily routine (which tends to be a different process for men and women in most societies). This idea supports the liberal ideology of education as self-improvement and individual advancement. Yet such a conservative approach does not uphold well the interests of marginalised older adults, who are trying to assert some real influence over their lives.

The functionalist perspective prevails in the field of educational gerontology. Brian Findsen tackled this matter, saying:

> *In the field of educational gerontology, as I prefer to call it, the predominant preoccupation has been describing what is rather than what could or ought to be. Studies of older adults have tended to emphasize how this population of adults can achieve 'successful ageing', as if there is some golden future available to all, if only they knew the right formula to achieve it – good exercise, sensible diet, mental alertness, social participation, continuing education, etc. (Findsen, 2005, p. 21).*

An array of critical perspectives within the field of social gerontology emerged amid the rapid socioeconomic and political developments in the 1980s. These ideas became subjects for the core debates in educational gerontology, particularly during the prevalence of critical educational gerontology in the mid-1980s (Whithnall, 2000). Several theorists – Battersby (1993), Glendenning (2000), and Phillipson (2000) – were particularly influential in highlighting the significance of the critical educational paradigm.

Phillipson (2000) analysed three critical angles in gerontology, namely the perspective of political economy, humanistic perspectives, and the biographical and narrative points of view. He extracted important elements from these three perspectives:

> *From political economy, there is awareness of the structural pressures and constraints affecting older people, with divisions associated with class, gender and ethnicity being emphasised. From both a humanistic as well as a biographically-oriented gerontology, there is concern over the absence of meaning in the lives of older people, and the sense of doubt and uncertainty which is seen to pervade their daily routine and relationships. Finally, from all three perspectives there is a focus on the issue of empowerment, through the transformation of society, or the development of new rituals and symbols to facilitate changes though the life course (Phillipson, 2000, p. 25-26).*

The perspective of political economy is deemed to stress how the state and the economy affect the process of ageing. From a humanistic perspective, the individual's active construction of his/her own world is highlighted and this is reinforced by biographical accounts of relationships between the individual self and society.

Critical gerontology has drawn on a wide range of intellectual traditions, such as Marx's account of political economy, the Frankfurt School, and more recent researches by Jurgen Habermas, psychoanalytic perspectives, as well as contemporary sociological theories like those of Anthony Giddens (Phillipson,

2000). Glendenning (1991) explored the idea of a 'critical educational gerontology' and he perceives the role of this new kind of gerontology as follows:

> *Critical educational gerontology would encourage tutors and students to examine the relation between knowledge and power and control. It would enable education to be seen as an agent of social change, as it was by the early exponents of the University of the Third Age in France. It would take into account the conflicting messages that we receive about the learning characteristics of older people. We also need clear answers to a number of questions. Among them are: whose interests are being served? Why do we need education for older adults? ... Should we not be questioning existing practices and models of education for older adults or are we content? (Glendenning, 1991, p. 215-216)*

Glendenning and Battersby (1990, p. 223-225) give a critique of the conventional thinking in the field of educational gerontology (which Findsen (2005, p. 22) argues is still valid despite the decade-old reproach, though with some change in emphasis). Firstly, they point to the need to argue against the tendency to consider the elderly as one homogeneous group – as if social class, gender, and ethnicity differences can be easily erased by participation in education. Secondly, to recognise that the plethora of psychologically-focussed research into developmental, cognitive and learning characteristics of older adults present a confusing picture which moreover tends to highlight only people's deficits. Thirdly, to recognise that there is very little that education can do to reverse a decline in the physiological condition of older adults. Fourthly, to recognise the dearth of philosophical debate on the purposes of education for older adults i.e. why should older adults continue to be educated? Fifthly, to recognise how the educational provision for older adults has been driven by middle-class notions of 'education'. This has created a pretentiousness that should be challenged. Sixthly, in the political climate of the New Right, the call for 'education for older people' has assumed slogan status and we are fooling ourselves to think differently. Finally, the question of "Whose interests are being served?" needs to be continually asked since there is now in existence a major exploitative industry that

purports to meet the learning needs of older adults. As pointed out above, older adults are often viewed as homogeneous. In fact, subgroups of older people differ significantly from each other based on gender, social class, ethnicity, and other variables.

Particularly, given that the numbers of women who participate in U3A are more than men, there is a need to consider women's characteristic and educational needs more than those of men. Midwinter (1996, p. 34-35) points out that in the United Kingdom just over three quarters of the membership of U3As are female. In 2001, DfES funded the Third Age Trust to conduct a survey across all the U3As and the results showed that women were 74 per cent while men were 26 per cent. Williamson (2000, p. 52-3) suggests three reasons to explain the gender imbalance. The first reason is simply the longer life expectancy of women than men. Therefore, women are more likely to have and to take opportunities to access educational organisations. The second reason is that women leave employment at an earlier age than men. Women are likely to leave employment usually when they marry or when they have a child. Williamson (2000, p. 52) argued that women face less difficulty than men when they experience retirement, given their various roles at work and at home throughout their lives. A third reason for the gender imbalance in U3As is related to elderly men's and women's marital status. Men in this age group are more likely to remarry than their female counterparts and tend to get involved in social activities accompanied by their wives.

Fry (1992) called for more unified theories of ageing as the ageing process is characterized by various social dimensions. Since most studies typically tackle the only the middle class elderly, and one should take more into account the differences on gender, race, and economic status. Carlton and Soulsby (1999) assert that there is a need for society to broaden participation in learning opportunities for older adults, because of the significant numbers of people deprived of the benefits of education due to their race and social class.
In spite of many initiatives throughout the developed world to give older adults the opportunities to pursue learning, research into the background of older

learners shows consistently that students are predominantly of white and middle class background and have access to the financial resources to pay for their tuition, and are in good health. They also have easy access to transportation as proven by their using a car or a convenient public transport system. However, this group of elderly makes up a very small percentage of the total older adult population (Carlton and Soulsby, 1999, p. 10).

One of the purposes of learning programmes for older people should be to give 'empowerment' to older people, in particular those in positions of lower socio-economic status. Cusack (2000) explains that the conventional meaning of 'empowerment' as 'power over' should be reframed as 'power to' and 'power with' to refer to the ways it enables older people to shape the policies and programmes that influence them. Another general pattern is that past beneficiaries of previous education services are more likely to gain additional learning experiences. In New Zealand, Benseman (1996) noted that those who tend to participate more in adult education are those who have attended school for more than the average amount of time and who have gained formal qualifications. There is also a bias towards women, although men tend to be a majority in more vocationally oriented courses. The most typical learners are less than 40 years of age; they have above average incomes, and full-time work, usually in white-collar jobs. On the contrary, the marginalised segment of adults includes the elderly, ethnic minorities, immigrants, and school drop-outs due to financial difficulties.

The NIACE annual survey in the UK reports that participation in learning is determined by socio-economic class, employment status, age and prior learning (Aldridge and Hughes, 2012, p. 4). Firstly, class is a major predictor of participation in learning. Second, older people generally tend to participate less in learning. Third, the "2012 survey confirms the key divide between those who leave school at the earliest opportunity and those who stay on even for a short while" (p. 5).

Field (2006) also observes that active adult learners are predominantly from economically and socially advantaged groups and non-learners are concentrated among the economically and socially disadvantaged. Evans (2009) argues that "claims that a learning revolution is taking place reflect dominant political and economic interests in sustaining the belief that people have to 'learn for a living', to maintain their livelihoods. Since this process appears to be reinforcing inequality and increases the gap between the powerful and the powerless, it cannot properly be called revolution" (p. 41).

Although this study is not about comparing participants in learning with non-participants, the socioeconomic information of the field study groups – namely gender, age, employment status, class, educational background, and living status – were gathered and analysed in order to provide an analysis of underlying motivations to participate.

2.6 SUMMARY

This cross-national study between UK and Korea combines two models for comparative studies. The first model is Bereday's (1964) systematic approach to comparative education. The procedure of working on comparative education according to the Bereday model consists of four steps: the description of raw data; the interpretation of the data; juxtaposition in order to establish criteria of comparability and of a hypothesis for comparative analysis; and finally comparison (Bereday, 1964, p.28). The second model for comparative study is multi-faceted analysis, according to the cube proposed by Bray and Thomas (1995). Bray designed this method to illustrate how three dimensions (location, non-location, and the aspect of education) could be integrated to promote an understanding of the wider structures and contexts.

Secondly, for the organisational analysis, this study drew on a method of broad-based institution investigation by Manheimer (1995). He formulates taxonomy of critical pathways with fifteen stages (see Table 2-1), derived from David

Peterson's (1983) fifteen planning phases of educational programmes for older adults. In this study, Manheimer's taxonomy is reviewed and divided into two parts: management, and learning and teaching approach of the institution. The observed differences in management and the approach to teaching and learning of the Korea and UK institutions will be analysed in light of the cultures of ageing and learning in the two countries.

Thirdly, this study adopts the dimensions of andragogy and pedagogy proposed by Knowles (1980) in order to examine the differential characteristics of teaching and learning as well as management in the two organisations. In this study, the andragogy model and pedagogy model invoke three concepts: management style; the relationship between teacher and students; and the curriculum and teaching methods.

Fourthly, for the understanding of older people's participation in learning, this study uses the concept of the Chain-of-Response (COR) model developed by Cross (1981) in order to discuss how older adults might be influenced to participate in U3As and SUs. This model assumes that participation in educational activities, whether in an organisational setting or self-directed, is not a single act, but the result of a chain of responses by the learner. I selected this COR model as it can deal with the comprehensive perspectives and multiple factors which affect participation for U3A and SU members.

Finally, for the analysis of the cultural differences, a critical view is applied based on critical educational gerontology. Central to this is the idea of ageing and learning as a socially constructed event. From this social gerontological perspective, critical views are adopted for analysing different learning characteristics of older people in the two countries, making use of data about socioeconomic factors including gender, age, employment status, class, educational background, and ethnicity.

CHAPTER THREE: METHODOLOGY AND METHODS

3.1 INTRODUCTION

In this research, the terms 'methodology' and 'method' will be distinguished (although in quoting from other work the terms will be used according to the source meaning). While 'methodology' refers to the main style and mode of research – such as experiment, survey, ethnography, historical research, action research, case study, comparative study – 'method' will refer to an actual instrument used for data collection or analysis, for example, questionnaire, interview, and so on.

This study adopts an 'eclectic methodology' for a cross-national study between the UK and Korea that combines two models for comparative study: Bereday's (1964) systematic approach to comparative education, and Bray and Thomas's (1995) multi-faceted analysis (based on Manheimer's (1995) broad-based analysis of educational institutions). The main unit of analysis of this study is the learning of older people in each country. There are four sub-units of analysis: the development of each learning institution; the management of the institution's local branches; the teaching and learning patterns of the local branches; and the participants' learning experiences (In Figure 3-1, I show in a diagram the different elements of the Multi-layer Framework of this study).

The current chapter presents the methodological approach of this study along with justification of the analytical framework, the selection of samples, and the methods of data collection that have been used in this research (also the ethical protocols that were followed). It also discusses a pilot study that was completed prior to the main study, and the process of 'back translation' that is very important in an international and cross-cultural comparative study.

This research was carried out in two different steps; the first step included documentary review and analysis related to the learning experiences of older

people. The second step involved data collection from different U3As and SUs by conducting interviews and field visits as well as distributing questionnaires to institutional representatives and members.
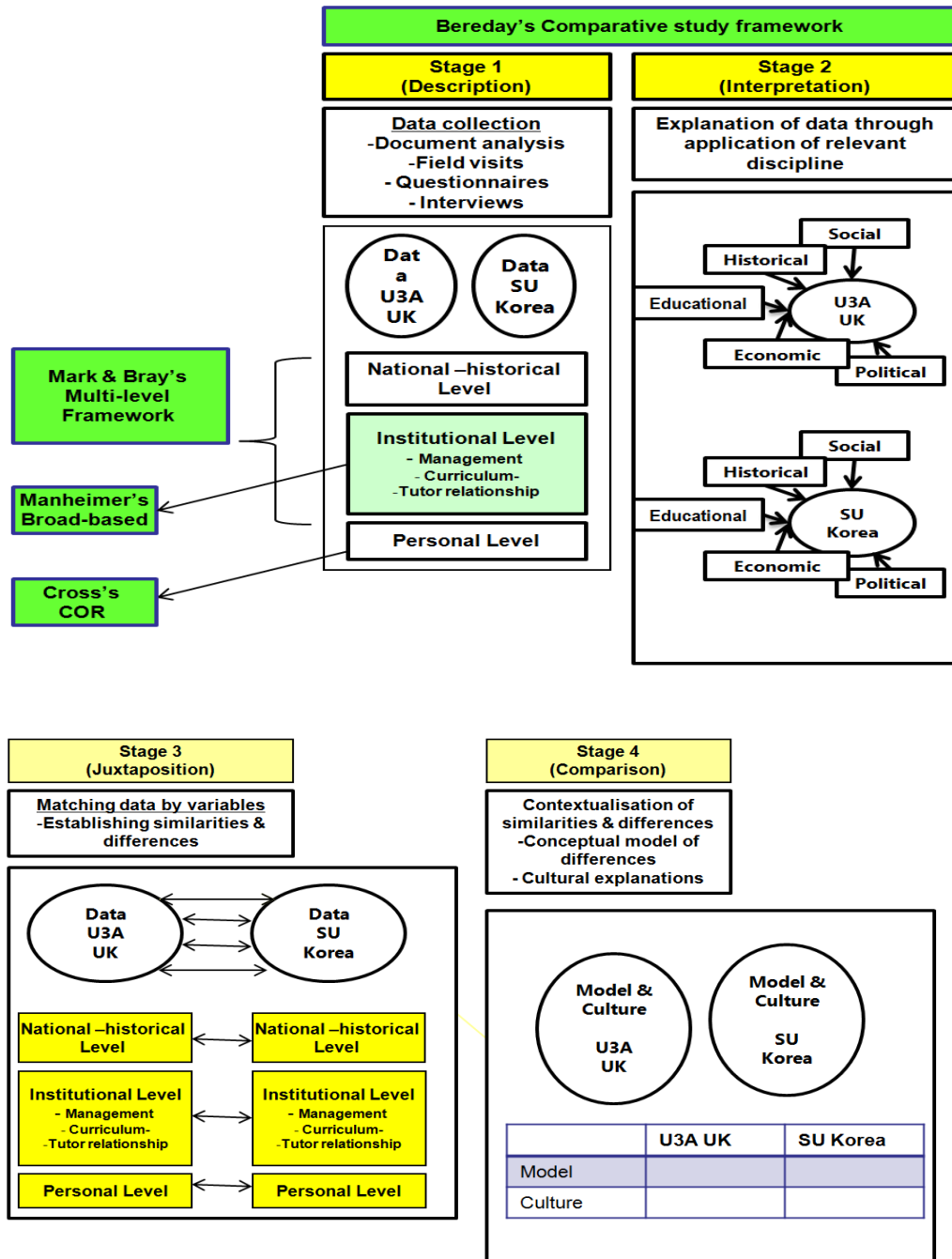
Figure 3-1 Multi-layer Framework of this Study

3.2 SITUATING THIS STUDY

3.2.1 Reasons for Undertaking Comparative Studies

The purposes of undertaking a comparative study may be various. International bodies such as the OECD and UNESCO compare patterns of practice in different countries in order to improve the advice that they give to national governments and others. Typically, comparative research studies are enthused by the drive to borrow, advise, assess, and by the curiosity to discover and describe alternative cultural practices (Evans, 2002).

Comparative studies in the field of education have been particularly concerned with developing awareness of the strengths and shortcomings of the education systems being examined. Sir Michael Sadler observes that "the practical value of studying, in a right spirit and with scholarly accuracy, the working of foreign systems of education is that it will result in our being better fitted to study and understand our own" (Sadler, 1990, reprinted, 1964, p. 310).

Using comparative studies is of paramount importance to gain a better comprehension of the complex interaction of global trends and local actions in education systems. It is only by conducting comparative research that the subject matter can be tackled from the standpoint of both the macro- and micro-level forces that influence education systems in different parts of the world (Arnove and Torres, 2007). Arnove & Torres propose three principal dimensions of comparative education, namely scientific, pragmatic, and global understanding (p. 4).

George Bereday, one of the best-known contributors to the field of comparative education, defines comparative education as the analytical study of foreign education systems (Tretheway, 1979, p. 1). The models of comparative education enable us to conceptualise, compare and contrast different philosophies, approaches, and practices. Comparative educators seek to make use of the shared

wisdom and experiences of societies, groups of individuals and institutions in the global community as they believe that there is much to be gained from being informed about each other's successes and failures, as problems are solved more easily by drawing on the lessons of others' experiences.

Comparative study emphasises theory building, where researchers utilise theories and methodologies from various fields and relate them to problems in education to 'explain why education systems and processes vary and how education relates to wider social factors and forces' (Epstein, 1994, p. 918).

Melvin Kohn (1987, p. 85) recognized three main benefits of cross-national research. First, research findings which are found to be relevant and applicable not just to a single nation but to other countries as well, gain more credibility. The hypotheses of such studies tested initially in one country are further strengthened by the data derived from the other countries. Second, the cross-national perspectives contribute to an enriched understanding of the processes of social change in different countries. Third, cross-national research presents a vital methodological tool. By working towards the use of more universal research techniques, the possibility of having improved research designs for future comparative projects is realisable.

According to Mark Bray (2004, p. 15), the goals of comparative study in education are determined by the individual who conducts the comparison under certain conditions – at a local level, parents usually compare schools and educational systems in order to look for the best institution that can meet their children's needs; policymakers look at the education systems of other countries to develop ways to achieve their national political, social, and economic objectives; international organizations also compare experiences in different countries as a source of practical knowledge which will be used strategically to advise national governments; education practitioners, primarily head teachers and senior teachers, also take advantage of comparative research to improve their ways of management; and scholars also make use of comparative research to design

theoretical paradigms that can help us understand the dynamics behind teaching and learning in various settings.

According to the classification by Bray (2007), comparative educational research falls into three broad categories: academics who develop theoretical models in different settings; practitioners who aim to improve their own situation; and policy makers who seek to identify ways to achieve their objectives.

3.2.2 The Development and Types of Comparative Education Study

According to the writings of comparative educators, comparative studies started from the activity of visits to other countries and the borrowing of ideas and practices. Brickman (cited in Tretheway, 1979) asserts that the origin of comparative education goes back to ancient history. He expresses his view as follows:

> *Visitation of foreign countries, whether for the purpose of commerce, conversation, curiosity, or conflict, goes back to ancient history. Travellers in all historical periods must have brought back facts and impressions concerning the cultures of the other countries they had visited. Included in their reports must have been comments relating to the young and their upbringing. They may have made some remarks regarding the similarities and differences in the ways of educating children. Some, indeed, may have arrived at conclusions involving the expression of value judgment (Tretheway, 1979, p. 12).*

Travellers' incidental discovery of educational practices abroad developed into expeditions by travellers having specialised interests in education systems (Tretheway, 1979; Kubow and Fossum, 2007).

With the development of national systems of education in Western countries in the nineteenth century, educational administrators and reformers, politicians and experts traveled to specifically discover what was going on in education overseas in order to apply the best practices abroad into their own system. They were

interested in new educational theories and methodology, in organisation and financing, in curriculum and teacher training; in fact in all aspects of education that would advance their own schools. It was not enough to accumulate information about educational practices in other countries or simply to borrow practices indiscriminately. Issues of interpreting observed practices in context, and of judging or predicting whether a particular arrangement of practice could be transplanted successfully in the home environment had to be considered (Shin, K., 1985, p. 3; Kubow and Fossum, 2007).

Thus comparative education has progressed from a process of gathering purely descriptive materials towards a speculative approach based on the underlying forces for borrowing, leading to clearer insights that allow a better understanding of the home system.

Since World War II, interest and activity in comparative education has increased significantly because new and influential national and international agencies have become involved in educational inquiry. And more recently, comparative education is seen to have developed as a distinct discipline within social science. The modes of analysis have become less historical and more quantitative and empirical, drawing on the techniques and conceptual frameworks of sociology, economics and political science in particular (Shin, K., 1985, p. 4).

Tretheway (1979) sees the 1960s as the period characterized by the strongest interest and debate into the methodologies of comparative education. Key publications of this period on the methodology of comparative education were: Bereday's "Comparative Method in Education" which appeared in 1964, Holmes' "Problems in Education - A Comparative Approach" in 1965, King's "Comparative Studies and Educational Decision" in 1968, and Noah and Eckstein's "Towards a Science of Comparative Education" in 1969.

The methodologies of comparative study are correlated to the goals that people hold for comparative education. The stimulus for comparative education in recent

decades stems from the growing interests of political leaders and administrators in managing and reforming national educational systems. Some of the generally accepted goals are: comparative education should result in a better appreciation of learning processes; it should represent the national interest and identity of a particular country; it should facilitate initiatives towards school system development and reform, and it should foster a global mindset among learners.

To achieve these aims, comparative methododologies were subsequently developed by leading scholars in this field. Tretheway (1979) extensively reviewed various approaches like Kandel's historical approach; Bereday's cross-disciplinary approach; Holmes' problem approach, and Noah and Eckstein's comparative education as a social science. Mark Bray (1995; 2004; and 2007) proposed the multi-level analysis model. This model is typically represented as a cube of three dimensions, with geographical/locational, non-locational/demographical and educational as the three variables, and with each dimension divided into sub-levels, (so that the cube consists of many possible sub-cubes).

3.2.3 Precautions and Avoidance of Pitfalls in Comparative Study

Bereday (1964, p. 10) stresses three fundamental aspects of preparation for comparative education, which are "a knowledge of the language of the area under study, residence abroad, and a never-ceasing watchfulness by the observer to control his own cultural and personal biases. Failure to comply with these prerequisites cuts one off from the true nature of the educational system under observation as effectively as blindness." As this study is much concerned with examining the cultural meaning of ageing and learning in two countries, particular preparations were made for the research for this thesis. The researcher is a native of South Korea, and research was started after three year's residence in the UK, involving intensive English language training and observation of society in general, and the specific educational systems and culture of older people. The researcher worked as a volunteer at the 'Help the Aged' headquarters in London

for a year, and worked as a school teacher in the North London Korean School (with students aged from 3 to 16) for 2 years.

Tretheway (1979) assesses the pitfalls of comparative education, particularly on issues of comparability, and identifies several check points for ensuring comparability. First, one should be able to decipher if identical terms carry the same meaning as there is a natural propensity to presume that the meanings attached in a particular home setting will apply in other places. However, those who conduct comparisons need to be cautious about the meaning of even commonly used terms. For instance, the meaning of the term 'public school' in England is actually a private school, opposite in meaning to 'publicly-run school' in the U.S.A.

Second, are the same groups being compared when the educational and social systems of different countries are considered? For example, in comparative study of academic achievement of students, the dimension of selective or open admission should be considered in comparing groups of students. In this research, I selected the SU organisation in Korea after considering the issues of comparability. There were four reasons for this choice: First, SU is exclusively for older people; second, SU is an organisation only for learning; third, SU is an independent organisation in the voluntary sector, i.e. not controlled by the government; and finally, it is a nationwide organisation.

Third, how should research take the different purposes of organisations or individuals into account? Institutions may have the same name or function in different societies, and share broadly similar cultural and educational traditions, but still they may operate on significantly different rationales. In this research, one of the core aims for the comparison of institutions (U3A, SU) was to clarify the rationale of their operations.

Fourth, the 'generality-specificity trap' must be avoided. It is difficult to generalise correctly about education because of its diversity and complexity, and the

interacting effects of particular political, social, economic, and educational forces. Yet there is a tendency in seeking comparisons to over-generalise from specific cases. One of the methodological strategies for avoiding such a trap in this study has been to look systematically at the backgrounds of each society, to select cases to represent each system, and to state clearly the limitations of generalisation.

Fifth, the choice of systems, countries, and cases for comparison is crucial. If the purpose is problem-solving or policy recommendation, we will seek 'reference countries' which are perceived as having dealt with (apparently) similar problems. Even though this study is not directly intended for policy recommendation, the findings of this research are intended to inform policy recommendations related to social problems of ageing and learning. In this respect, the choice of cases for this research was considered as discussed in section 1.1.

3.3 THE ANALYTICAL FRAMEWORK FOR THIS STUDY

A multi-faceted analysis has been adopted (Figure 3-2, Table 3-1) according to the cube model of Bray and Thomas (1995). In this study, four cubes are investigated. Cube A is the integration of third age, country, and the development of each institution; Cube B is the integration of third age, local institutions and management; Cube C is the integration of third age, local institutions, and the teaching and learning orientation; Cube D is the integration of third age, individuals and their learning experiences. Each cube is related to each of the research questions in this study (see section 1.2).

In cube A, for the comparison of the historical development and current state of each institution, the ways in which each institution started and the national structure was formed are examined. In cube B, in order to compare the institutional management and institutional orientation to teaching and learning, a model of institutional management and teaching and learning was formulated, adopted in part from Manheimer's (1995) critical pathways taxonomy of fifteen stages (see Chapter Two). This model is adopted because of its usefulness for

making a broad comparison between institutions and programmes. Based on Manheimer's fifteen stages of programme evaluation, nine categories were used and four new categories were added. Therefore, for this research, a total of thirteen components of analysis were chosen, as presented in Table 3-1 below.
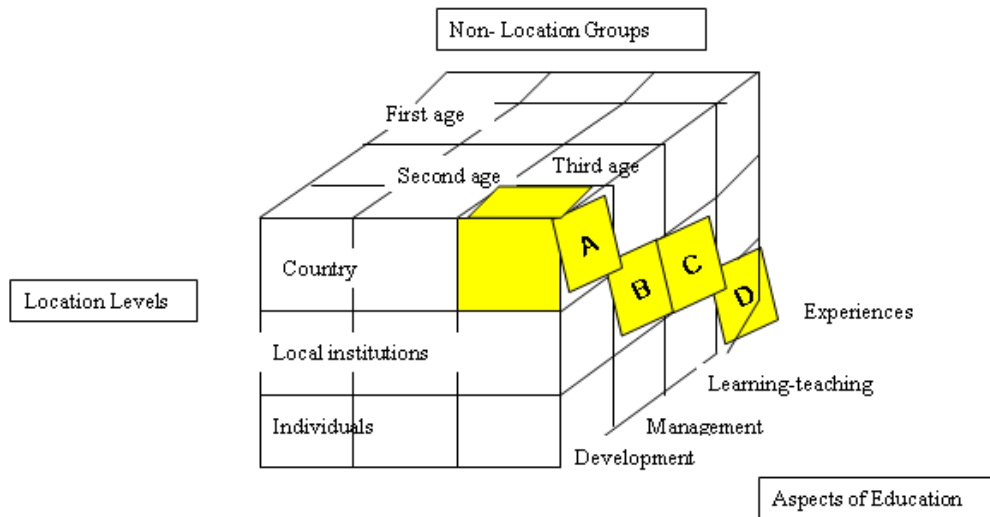
Figure 3-2 Multi-faceted Model for the Study
(Adapted from Bray and Thomas, 1995)

In cube C, for analysing and comparing members' preferences of learning subjects and their reasons for choosing U3A or SU, four components are developed based on Cross' Chain-of-Response (COR) model (1981): membership; subjects and activities; reason for joining and attitudes towards learning and ageing. Eight socio-demographic variables are analysed: gender, age, living alone or accompanied, level of education, job, financial status, health condition and leisure activities (see Table 3-1).

Table 3-1 Analytical Unit, Level, and Variables

Main Unit	Learning of older people in the UK and in Korea			
Levels	National development of U3A/SU [Cube A]	Local institutional management [Cube B]	Local institutional orientation to teaching-learning [Cube C]	Participant experiences [Cube D]
Variables	History	Inception	Programme content and activities	Membership
	Current state	Membership/Scale	Tutors	Subjects and activities
		Funding and resources		Reason for joining
		Administrator		Attitude towards learning and ageing
		Participants		Socio-demographic backgrounds
		Marketing		
		Premises		
		Evaluation `		
		Expectation from the government		
		Uniqueness		

3.4 DATA COLLECTION METHODS

In this study, quantitative and qualitative methods have been combined in a methodology that aims to describe differences in the development of institutions, and to analyse these in terms of the different cultural meanings attached to learning and ageing in the two countries (Evans, 2002). This study draws on multi-source data and evidence from documents, interviews, questionnaires and observation. In the next sections, I will first explain the basic approaches to data collection, and then explain   the key aspects of each data collection method.

3.4.1 Approaches to Data Collection: Qualitative and Quantitative Methods Combined in the Methodology

Historically, a cross-national comparative study fits better within a qualitative paradigm when the number of cases is small. Such research tends to be more concerned with the influence of politics and the macro-culture on the shape of school systems. Currently, however, with the advance of computerised statistics and the ease of pooling empirical data from many countries, researchers are increasingly applying quantitative methods (Smyth et al., 2001). Smyth, et al (2001) classified comparative research into three strategies: universalistic, intermediate and particularistic. The universalistic strategy typically involves an extensive approach to comparison, making use of a large sample of different countries in order to distinguish empirically among alternative country-level explanatory variables. The particularistic strategy typically uses a small sample of countries, often just two or three, to make interpretive comparisons with the main aim of highlighting qualitative differences in concepts and institutions. This approach underlies the view of comparative research as a means to gain a better understanding of one's own country, by exposing taken-for-granted assumptions and challenging the status quo.

Table 3-2 Comparative Research Strategies

	Universalistic	Intermediate	Particularistic
Aim	To identify universal laws or patterns	Mixed aims	To elucidate national uniqueness
Method	Replace countries with variables	Use common concepts to describe and classify national logics and analyse differences	Use distinctive concepts to describe and analyse internal logic of each country
Use of comparison	Extensive: large sample of countries to represent variables of theoretical interest	Intensive: use small sample of countries; multiple comparisons provide degrees of freedom	Interpretive: use small number of national contrasts to highlight differences in concepts and institutions
Data collection	Quantitative	Quantitative and qualitative	Qualitative

(Source: Smyth et al, 2001, p. 37)

The contrast described above is a matter of emphasis; there are few pure examples of either strategy. Most researchers adopt an intermediate position. In the middle column of Table 3-2, intermediate strategy is identified as having both universalistic and particularistic purposes, recognising the existence of distinctive national 'logics' but at the same time seeking to develop common cross-national concepts to describe them, and cross-national theories which at least partially explain them. Its characteristic research approach is the use of intensive comparisons, which test a range of predicted contrasts or similarities across a small sample of countries. The intensive approach compensates for the lack of range at the country level by making multiple comparisons and testing a range of hypotheses arising from the same theoretical starting point.

3.4.2 Document Analysis

Documentary analysis has included the systematic review of research, research reports, organisational records, surveys and statistics that are relevant to this study. The documents have been collected from academic and national libraries, websites, and individual contacts from relevant institutions. Demographic trends, older people's learning situations, policies related to older people, and data about the development of each institution in the two countries have been examined.

3.4.3 Questionnaires

The questionnaire method was selected as the primary method for collecting information and the opinions of respondents. The reason for using a questionnaire is that the opinions of respondents can be obtained and be compared across two countries in a structured manner. Questionnaires are typically categorised as namely structured, semi-structured or unstructured. Structured questionnaires have a clear set of questions, usually with 'yes' or 'no' answers or multiple-choice options. They are useful for producing quantitative data. Semi-structured questionnaires contain answers and options, but also open text boxes where the respondents are invited to add some comments of their own. Unstructured

questionnaires consist of open-ended questions to explore issues and may raise issues that have not been considered in advance (Gillham, 2000).

In this research, two kinds of questionnaires were used: one was for members of U3A and SU; the other was for the organisation chairpersons or representatives. All questionnaires were semi-structured, consisting of both multiple-choice options and open-ended questions. Although most of the open-ended questions called for short answers, there were some questions designed to elicit opinions from respondents.

The two questionnaires were pre-tested in the pilot study, which is explained in detail in Section 3.7. During the pilot study, especially for older learners in Korea, interviews were preferred over self-completion questionnaires because some of the older learners might find it difficult to read questionnaires or write their responses. Therefore the two questionnaires were transformed into interview schedules for the field work but the interview schedules were designed in the form of semi-structured questionnaires in order to use them as questionnaires if the situation did not allow interviews.

During the fieldwork, it was found that questionnaires were mostly preferred by the deans or chairpersons, rather than interviews, because of the difficulty in arranging face-to-face interview meetings. Thus the interview schedules were adapted for use as self-completed questionnaires. This turned out to be better for me as a researcher, because the questionnaire method is more effective in terms of time and cost, and the deans or chairpersons promised to help older learners to complete the questionnaire if they faced any difficulty. As a result, I was able to collect more data in a relatively short time. In the case of local representatives in the UK, informal conversations with the managers were carried out and then I asked them to complete the questionnaire. I also tried to develop the members' questionnaire electronically for use via the internet, with the help of the international U3A web developer. However, because the questions were many and the length of the questionnaire was long, it was difficult to organise this, and I did

not pursue it. Also it is worth noting that internet-based survey research has benefits in cost and convenience, however the researcher usually must deal with problems of low response rates and issues involving sampling bias and representativeness (Evans and Mathur, 2005).

3.4.4 Interviews

Interviews are usually categorised into four types, in terms of the degree of structure and advance preparation of questions: informal conversational interviews; guided interview approach; standardised but open-ended interviews; and closed quantitative interviews (Patton, 1990). Brief definitions of each type of interview are as follows:

- Informal, conversational interview: no predetermined questions are asked, in order to remain as open and adaptable as possible to the interviewee's nature and priorities; during the interview, the interviewer "goes with the flow."
- Guided interview: the guided approach is intended to ensure that the same general areas of information are collected from each interviewee; this provides more focus than the conversational, but still allows a degree of freedom and adaptability in getting the information from the interviewee.
- Standardised, open-ended interview: the same open-ended questions are asked from all interviewees; this approach facilitates faster interviews that can be more easily analysed and compared.
- Closed, fixed-response interview: all interviewees are asked to choose answers from among the same set of alternatives.

Semi-structured interviews, based on an interview schedule combining fixed-response questions of typed (d) and open-ended standardized questions of type (c), were initially planned for this study (see 3.4.3 above). In practice, however, the interview schedules were adapted to a questionnaire format and given to members and representatives for self-completion, because these were preferred by participants and were more appropriate to the situation. During data collection visits I began with informal, conversational interviews with the chairpersons,

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although most people preferred to give detailed responses using a questionnaire. The short interview was important to establish personal contact.

I did not ask the national or regional representatives of U3A to complete the questionnaire. Rather, I used some prepared questions for the national representative of U3A about the development and structure of U3A. The interviews with the national and local representatives of the institutions produced the most essential sources of information for this study as their responses examined the development of local and national institutions. During each interview, I clearly explained my intentions and the nature of my study before requesting consent from the interviewee (cf. Kvale, 1996). The interview process was not audio recorded but was captured through written notes because people could feel uneasy talking with an audio recorder, and I wanted to make my respondents feel comfortable in talking about what they feel and think (Cohen et al., 2000, p. 281).

3.5 THE DEVELOPMENT OF THE QUESTIONNAIRES

3.5.1 The Institutional Representative Questionnaire

Based on Manheimer's fifteen stages of programme evaluation, nine categories were used (with some revisions) and four new categories were added. Manheimer's categories of 'assessment' and 'planning' were used in draft versions but omitted in the final version. The category 'rationale', with the name 'mission', was in the final version, but this was merged with the category 'running body' in the process of data analysis. The categories of 'strategy' and 'by-product' were not included. Four categories considered as important factors in developing educational programmes, namely tutors, marketing/advertisement, governmental support, and uniqueness of the institution, were added. Therefore, this research used a total of thirteen components of analysis in order to examine the cultural differences and meanings between the two institutions. The comparison between Manheimer's taxonomy and the categories for this study is shown in Table 3-3.

Table 3-3 Comparison of Manheimer's and this Study's Categories

Manheimer's 15 stages			This study [13]
No	Taxonomy	Contents	Category
1	Inception	origin of the programme and institutional goal and motivations	Inception [1]
2	Assessment	determination of the need, desire, and feasibility of the programme	-
3	Planning	method of planning, make-up, and authority of the planning committee	-
4	Funding and resources	expenses, revenue sources, and institutional support	Funding and resources [2]
5	Participation	targeted population, socio-economic characteristics, and degree of inclusiveness	Participation[3]
6	Rationale	justification, benefits, mission and purposes of the programme	Administrator[4]
7	Governance	representation and method by means of which the programme direction is decided	
8	Organisational positioning	administrative placement in the host institution	
9	Programme content and pedagogy	curriculum design, staffing, and teaching method	Programme content and activities[5]
10	Strategy	short-term or long-term focus and societal impact	-
11	Scale	goal for the size of the programme, number of the programme units, involvement in community, and intergenerational projects	Membership/Scale[6]
12	Delivery	location and number of sites, co-sponsors, and use of direct learning technology	Premises[7]
13	Evaluation	criteria of success and procedures for determining these	Evaluation[8]
14	Continuity and growth	growth goals, size limits, and institutional development	Free opinion on institutional evelopment[9]
15	By-products	publications, exhibits, recognition events, and new programmes	-
			Marketing[10]
			Tutors[11]
			Expectation of governmental support[12]
			Uniqueness[13]

The contents of questions and their numbers in the questionnaire according to each category are shown in Table 3-4. The questions are not placed in sequence according to category because some questions within the same category are specific enough to come later. The socio-economic background of the respondents was asked at the end of the questionnaire. Regarding the types of question, multiple-choice and open-ended questions were mixed. Some questions are open-ended, with most of them designed to seek factual information, while a few were designed to extract the respondents' opinions. During the course of the fieldwork in the UK, additional questions were included. These questions were displayed on a separate sheet. The additional questions numbered A2, A4, and A5, are relevant only to the UK case, because they are about capitation fee, insurance, etc. of U3A.

Table 3-4 Structure of Questionnaire for Institutional Management

No	Category	Content of Questions	Question Number	Additional Questions
1	Inception	Year of establishment	1	
		How started?	*	A1.
2	Membership/Scale	Number of members	2	
		Condition of member	3	
		Ideal size of local U3A/SU	14	
		Ideal size of each class	15	
		Change of scale	16	
3	Funding and resources	Resources	8	
		Fees	9	
		Funding profile	10	
4	Administrator	Responsibility for running	11	
		Paid staff	12	
		Committee	13	
		Linkage to Headquarter	17	
		Support from Headquarter	18	
		Capitation fee's usage, benefits	*	A4. (UK)
		Reason to be within U3A	*	A2. (UK)
		Usefulness of U3A Trust	*	A5. (UK)
		Constitution		A6.
		Determination of mission and change	19	
5	Participant	Economical and educational level	20	

		Reason of participation and non-participation	21 22	
		Attempt to encourage to ethnic minorities, the , disabled, or those who are from poor-socio economic background	23	
6	Marketing	Ways of letting people know the programme	24	
7	Programme content and activities	Course or subject based	4	
		Kind of subjects	5	
		Kind of social activities	6	
		Approach to learning	7	
		Who determines programme	25	
		Kinds of content	26	
		What classes are like	27	
		Preferred activities by members	28	
		Classification of learning activities	*	A7
8	Tutors	Tutors or leaders	29	
		Invited speakers	30	
9	Premises	Premises	31 31.1	
10	Evaluation	Determination of success criteria	32	
		Expected benefits	33	**
11	Expectation from Government	Governmental support	35 36	
12	Uniqueness	Differences from French model (UK) Differences from other types of educational organisations (Korea)	*	A3.
		Differences from other U3A/SU branches	*	A8.
13	Free opinion on Institutional development		37	

* Supplemented by interview questions or additional questionnaire
** Question 34 is about the conception of being old: members' opinions were pooled and analysed.

3.5.2 The Member's Questionnaire

The members' questionnaire is composed of twenty-six questions, including eight about the member's socio-economic background. It is mainly focused on the preferences for learning subjects and activities and the reasons for choosing U3A or SU. Four components are used: membership; subjects and activities; reasons to

join, and attitudes towards learning and ageing. The are eight socio-demographic variables: that is gender, age, living alone or being accompanied, level of education, job, financial status, health condition, and leisure activity (see Table 3-5). The comparison of the socio-economic backgrounds of members in the two countries was one of the important research subjects, because the kinds of people who mainly use the programme have an impact on the culture of learning. Ten questions are open-ended, and the others are multi-choice questions.

In some questions, the choice of responses was different according to the situation of each country. In Question 6-1, the choices are different because the learning providers are different in each country. For example, there are no local adult education centres in Korea; instead there are local lifelong learning halls. In Question 7, the fourth option of the question "How did you learn about U3A/SU?" in the UK is 'from a library' but in Korea it is from husband or wife because in the pilot study in Korea it was found that older people tend to participate in SU following the husband's or wife's recommendation while in the UK people tend to obtain information from their local library. For question 17, in the UK, the choices are: listening to a lecture, joining in discussions, involvement in activities, and practising skills, but in Korea the option of 'practising skills' is omitted, because it was found out through a pilot study that there is actually no class for practising skills (e.g. language learning). However, the researcher found that omission of the option 'practising skills' was a mistake, because later in the fieldwork, practising skills like computer classes were found. An adaptation was made as follows. In the Korean questionnaire, the translation of the term 'involvement in activities' can include the concept of practice. Therefore participants of the survey could select 'involvement in activities' bearing in mind 'practising skills' or they could write down other options in the blank space on the paper.

Table 3-5 Structure of Questionnaire for Members' Experiences

No.	Category	Content of Questions	Question Number
1	Membership	Year of joining	1
		Any other institutions known about	5
		Any other institutions attended	6
		Channel for knowledge of U3A/SU	7
2	Subjects and activities	Number of subjects taken (UK only)	2
		Most preferred subject	4
		Subjects wanted to take in the future	10
		Preferred style of programme	16
		Preferred learning activity	17
		Leisure activity	26
3	Reasons and benefits from U3A/SU	Reasons to participate in U3A/SU	8
		Benefits expected from U3A/SU	11
		Reasons not to participate in U3A/SU	12
		Willingness to continue to participate in U3A/SU	9
4	Attitude towards learning and ageing	Conception of being old	13
		Being old oneself	14
		Learning in later life	15
5	Free opinion on the development of U3A/SU		18
6	Socio-demographic Backgrounds	Gender	19
		Age	20
		Living alone or accompanied	21
		Level of education	22
		Work	23
		Financial status	24
		Health condition	25
		Leisure activity	26

3.6 BACK TRANSLATION

Back translation is the process of translating a document that has already been
translated into a foreign language back to the original language, preferably by an
independent translator. Back translation can improve the reliability and validity of
research in different languages by comparing the original and back-translated

documents (http://www.asianmarketresearch.com). The aim of this process is to achieve different linguistic versions of the instruments that are conceptually equivalent in each of the target countries/cultures. The instrument should be equally natural and acceptable and should perform in the same way. The focus is on cross-cultural and conceptual equivalents rather than linguistic/literal ones.

In this study, back translation was carried out in three steps. Firstly, the original questionnaire and interview questions in Korean were translated into English by the researcher. Secondly, a bilingual expert in translation checked the accuracy of translation employing back-translation (reverse translation) from English to Korean. Finally, the researcher compared the original version with the back-translation. (The additional ten questions, which were added in the process of the field work, did not go through the back translation process.)

3.7 PILOT STUDY

A pilot study was carried out for the purposes of pre-testing of the research instruments, most particularly the self-completion questionnaires (cf. Teijlingen and Hundley, 2001; Gillham, 2000). There were two specific objectives. The first was that the appropriateness of questions should be tested in each culture. The second was that the wording, the order of the questions and the range of answers on multiple-choice questions should be thoroughly tested.

For the achievement of these objectives, the steps were set up as below.

1. Ask subjects for feedback to identify ambiguities and difficult questions;
2. Assess whether each question gives an adequate range of responses;
3. Establish that replies can be interpreted in terms of the information that is required;
4. Check that all questions are answered;
5. Compare the responses in the two language versions whether each question derives the same responses after back translation;

6. Discard unnecessary, difficult or ambiguous questions;
7. Re-word or re-scale any questions that are not answered as expected;
8. Shorten and revise.

My research was designed to compare data from two countries, so it needed to be piloted in each country. In Korea, the pilot study was conducted in the researcher's hometown, Daejeon, being the most convenient place to conduct the research. There were five local SUs in Daejeon. I contacted the nearest, and the Dean allowed me to conduct a visit the place (on 9th April 2006). I found that some older learners had difficulty in completing the questionnaire themselves, so I asked the questions and filled the questionnaires with answers from them. It took about 20 minutes with each member to answer the questionnaire. I found that some wordings and orders should be changed, because some questions were difficult to answer and were duplicated. From this experience, the researcher decided it would be preferable to carry out this interview method with elderly members more than self-completion of questionnaires. For the UK pilot study, I did not have an opportunity to visit the UK myself, due to my work in Korea. A local helper, a Korean, conducted the UK pilot study on my behalf, in April-May 2006. He was a research student at the IOE and had been living in London for 20 years. I informed him of my research questions and the aim of the pilot study. Below is the assistance that I requested from the local researcher:

- Local helper to contact the U3A by telephone.
- Explain the aim of the research and why pilot study is necessary
- Acquire permission for the visit for interviews with a representative and a member of a local U3A
- Visit at the appointed time.
- Ask each subject to read a covering letter from the researcher, explaining the aim of the research, the importance and the necessity of their participation, and how responses to the questionnaire would be used.

- Ask subjects to complete the questionnaire, and record the time taken to complete the questionnaire.
- Ask subjects for feedback to identify ambiguities, difficult questions, and inappropriate expressions in both the British and the U3A context.
- Invite frank opinions about this questionnaires and the present study.
- If possible, record the conversation in an audio tape otherwise, take notes of the conversation.
- Produce a diary of interviews and visits, writing about what happened during the visit, or make an oral report to the researcher.

The local helper visited BL[2] U3A on 1st May 2006 and met its secretary and a member. He audio-taped the conversation, and afterwards reported his visit to the researcher by telephone and a further face-to-face meeting in Korea. The local helper reported the feedback of BL U3A members, and they identified some difficult, ambiguous, and duplicate questions with comments on the questionnaires. Further, there was a message from the secretary welcoming the researcher to visit whenever necessary.

I will now summarise the issues and problems of the questionnaires as revealed by the pilot study. First, the questionnaire on institutional development consisted of thirty six questions, which were patterned after Manheimer's taxonomy (without any questions for the categories of assessment and planning). In total, nine questions were removed, others were changed, and ten new questions were added. Question numbers 3, 4, 5, 21, 25, 28, 29, 31, and 32 were deleted (see Table 3-6). The members' questionnaire experienced few changes. The pilot version consisted of twenty-five questions. To these, two questions were added and one question (No. 17) was deleted (see Table 3-6). Originally, No. 17 had been inserted in order to clarify any difference between the institution and the members' opinion. Because the equivalent item was deleted from the institutional questionnaire, No. 17 was deleted from the members' questionnaire. Thus, the final version contained

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[2] The names of local areas and institutions were anonymised by means of initials to retain confidentiality.

twenty-six questions.

Table 3-6 Questionnaires: Questions deleted after the Pilot Study

	Deleted Questions
Institutional Questionnaire	Q3. What was the reason that your local U3A was initiated? Was it in response to the demands of older learners, response to a community problem, need, desire, or because of a special opportunity given to local people by governmental policy? Q4. How and by whom is feasibility for the program determined? (Choose all relevant) ☐ 1) Formal feasibility study ☐ 2) Use of focus group ☐ 3) Institutional review of mission ☐ 4) Leadership incentive ☐ 5) Other Q4-1. Could you describe the feasibility determination process in detail? Q5. Who are the planners for determining the program feasibility – staff, recruited representative volunteers, a combination of both above, or a hired consultant? (Choose all relevant) ☐ 1) A hired consultant ☐ 2) Use of the paid staff ☐ 3) Involvement of older adults as volunteers ☐ 4) Other Q21. What kinds of effort do you think are needed in terms of expanding participation? (Choose all relevant) ☐ 1) Advertisement (Information) ☐ 2) Giving more concession ☐ 3) Making the program more interesting ☐ 4) Providing a shuttle bus ☐ 5) Equipping a nursery ☐ 6) Other Q25. Which kind of programme do you think older people prefer in terms of age group mixing way? ☐ 1) Programs for only older people ☐ 2) Programs mixed with other age groups ☐ 3) Depending on the programme ☐ 4) I do not know Q28. What are the criteria of success of programme? Q29. What is the main emphasis at your institution? ☐ 1) Recruiting new participants ☐ 2) Retaining existing participants ☐ 3) Both, recruiting new participants and retaining existing participants

	Q31 Are volunteer leaders and advisors encouraged to seek ambitious program expansion?
	Q32. What kinds of learning policies do you think the government should have for older people?
Members' Questionnaire	Q17. Which kind of programme do you prefer in terms of age group mixing way? ☐ 1) Programs for only older people ☐ 2) Programs mixed with other age groups ☐ 3) It depends on the programme ☐ 4) I do not know

As a result of the pilot study, some difficult, ambiguous, and duplicate questions were identified; also, people reported questions with inappropriate choice items for the U3A situation in UK or the SU situation in Korea. For example, Q9 asks about registration fee, course fee and membership fee. Now U3As in the UK have no registration fee and course fee. But I decided to leave such questions, with a note that respondents could skip them, because it was important to have equivalent instruments in the two countries.

3.8 CASE SAMPLING

The research questions necessitated the comparison of the characteristics of educational institutions in each country. It was assumed that the management of local institutions would be based on a similar national philosophy and culture. Nevertheless, it was necessary to sample local variations in order to clarify the characteristics of the institutions in each country. The samples of local institutions were selected in the capital cities of each country: London and Seoul.

In the case of UK, local institutions were selected through the webpage of the National Trust (http://www.u3a.org.uk). I sent an email to the HL U3A, and the representative responded to my email, introducing the London Regional representative. The London Regional representative understood the research process because she had taken comparative education as an MA course at the IOE.

She arranged for visits to two other local U3A sites, which I could not contact by email. As a result, three more local institutions (WF, MT, and BL) in London welcomed me to visit them. BL was already the location for the pilot study, and I decided to visit them in order to thank them and to talk more about their U3A (because I myself did not visit that place for the pilot study).

Additionally, I used the website of the International Network for Universities of the Third Age (http://worldu3a.org/), and contacted the webmaster to ask him to introduce me to someone who could talk about the development of U3A in the UK. TH, the webmaster, arranged a meeting with JT, who runs the 'World U3As' page under that website in the UK. TH belongs to the LS U3A and JT belongs to the RD U3A. In total, I could visit four institutions and distribute the members' questionnaire to six local U3As. However, I decided to use only three for the analysis of institutional development, excluding BL U3A, which was already the site for the pilot study.

In Korea, through the webpage of KOPA (Korean Older People Association) (http://koreapeople.co.kr) I could contact the main office. The officers introduced me to the Seoul Association of KOPA (http://www.federation.or.kr), where I could obtain the information for twenty eight contacts in SUs in Korea. In conducting fair sampling, I chose three local institutions in Korea, bearing in mind the characteristics of the U3As in London. HL U3A is very large, with about one thousand five hundred members; WF U3A is located in London where various ethnic groups live together; MT U3A is located in a rather wealthy area. I chose MA SU, because it is large, like London U3A; KD SU is like WF U3A; and SC is like MT.

Table 3-7 Cases of Local U3As/SUs for Visits, Questionnaire Survey and Interview

	UK	KOREA
Institutions for institutional management analysis	HL (London)	MA (Seoul)
	WF (London)	KD (Seoul)
	MT (London)	SC (Seoul)
Extra institutions which completed the members' survey	BL	
	LS	
	RD	

3.9 IMPLEMENTATION AND STAGES OF FIELDWORK

Fieldwork for this study comprised arranging appointments with key contacts, visiting, coding, analysing and writing-up (see Table 3-8). For carrying out fieldwork in the UK, I travelled to London in June 2006. Because I was living in Korea for work purposes, visits for data collection had to be planned before I left Korea.

In the UK, data collection was completed in July, and was followed by coding data onto spreadsheet (MS Excel) and a brief analysis of interview contents and responses. Once the brief analysis of the UK data was completed, fieldwork in Korea started, after the revision of the questionnaire. The arrangements for visiting and meeting the SU branches in Seoul were made in January 2007, and the distribution of the questionnaires was done in February. The completed questionnaires, with relevant documents such as the syllabus and constitution of each institution, if any, were returned in March and were coded in April and May.

Table 3-8 Schedule of the Fieldwork

Steps	Details of activities	Date	
		UK	**KOREA**
Arrangement	Initial contact (by email)	May, 2006	January, 2007
Visiting and writing field notes	Interview, distribution of questionnaires and observation of classes Taking field notes during visits, observation, and interviews	June-July, 2006	February-March, 2007
Coding	Coding completed questionnaire	August-October, 2006	April-May, 2007
Analysing	Interpreting interview contents and analysing questionnaire responses	November, 2006	June, 2007
Writing up	Writing up analysis	August, 2007	August, 2007

I visited the HL U3A in North London on 26th June 2006. After greeting and mingling with the people there, I got the opportunity to observe the classes. First, I observed the English history lecture for an hour, and briefly attended Scrabble and French classes. In the afternoon, I was able to join tap dancing and opera appreciation classes. On 3rd July 2006, I visited the home of the Chairperson of WF U3A. The Chairperson told me that she would distribute questionnaires to members which could be collected in the next visit. On 6th July 2006, I visited two places. In the morning, I went to meet JM, who is the representative of the Greater London Regional U3A Forum. In her home, there was an opera appreciation class. Six members took part in the class, and we had a conversation during tea time. Six members agreed to complete the questionnaires after class, and promised to send these to my address. The Chairperson of MT U3A invited me to his home, where he leads two classes: architecture and music. He used his own lounge as the classroom, which was large enough to accommodate eight students.

On 12th July 2006, I visited the BL U3A Secretary's house (BL U3A was already the site of the pilot study). The Chairperson invited six members to respond to my questionnaires. On 14th July 2006, I went to Oxford to see TH and JT, who

worked as leaders of the World U3A (http://www.worldu3a.org). TH suggested uploading my questionnaire on the webpage for the members of the U3A, so that I could collect their responses electronically. However, it turned out to be difficult due to the length of the questionnaire. I left fifteen questionnaires enclosed in an envelope for their members. On 18th July 2006, I attended the Summer Social Event of WF U3A, which was held at a Methodist church. The church hall was crowded with many members and there was singing, games and tea drinking. The chairperson introduced me to all the members, and I introduced myself and my research project to them.

In Korea, I started visiting SU branches in February 2007. On 13th February 2007, I visited the DM SU which occupies the second floor of the Kyungrodang of KOPA. There, I met the volunteer administrator who I interviewed briefly. I observed the computer class, where four members practised word processing.

On 20th February 2007, I visited the MA SU, situated because the Dean of MA is also the Dean of SH SU in Seoul. MA SU is using the same building as the MA Senior Welfare Centre. The Dean of the SU preferred that I leave the questionnaires with them instead of arranging one-to-one interviews with the members. On 27th February 2007, I visited the SC SU in order to give the questionnaires to the administrator (who works for KOPA). I asked her to help the older people if they have difficulty in answering the questionnaire. On 6th March 2007, I contacted another SU because I was unable to finish my interview at DM SU and could not find a suitable time for a second visit. Hence, I visited KD SU instead and met the Dean. I left 20 member questionnaires to be returned by post upon completion.

In the UK, I noticed that self- completion of the questionnaires was preferred by members of U3A, instead of being interviewed. Completing the questionnaires themselves allowed the members to answer the questions in their own time and at their own convenience rather than working with an interviewer for a fixed time. Besides this it proved difficult to schedule interviews with members.

In my field work in Korea, I faced the same problem. The Dean of the SU asked me just to leave the questionnaires, instead of arranging one-to-one interviews. For the Korean members, I thought that interviews would be more appropriate than questionnaires because completing the survey forms could be tedious. Therefore, I explained to the Dean my reasons for preferring interviews over questionnaires, but he assured me that he would ask some members to complete the forms, and that volunteers in the SU would help any member who might encounter difficulty in completing the questionnaire. According to Cohen et al. (2000, p. 128-129), there are advantages to self-completion over interviews: it tends to be more reliable; because it is anonymous, it encourages greater honesty. The disadvantage in this case was that I was not able to monitor any helper effects or other variations in how the questionnaires were completed. I examined the questionnaire responses for evidence of variations, by comparing interview-based questionnaire responses with self-completed responses, and concluded that the helper effects were not significant. As Mitchell (2009) has noted, in context-sensitive studies that rely on local actors for their participation, adjustments to the research methods often have to be locally applied and pragmatically adopted with a degree of tolerance for uncertainty.

After my second UK interview visit, I discovered some facts about U3A that I was not previously aware of. These concern the relationship between a local branch and the national office of U3A. Annually, local branches pay a fee of £ 2.50 per member to the national office, which is used in part for insurance of the U3As. I therefore wanted to inquire about the annual payment and the perceived usefulness of the National Office of U3A. To capture this new information, I developed an additional questionnaire with several more questions and used it from the third interview onwards.

The additional questionnaire comprises eight questions concerning capitation fees, reasons to be within U3A, the constitution of the U3A, the usefulness of the U3A Trust, the classification of learning activities, the differences from other educational organisations, the (perceived) differences from other U3A branches,

and the practical experiences of starting a local branch. Out of these eight, five questions (excluding the three questions related to the U3A Trust) were included in the Korean version of the institutional questionnaire, for non-members. The additional questions were located with similar ones. For example, "How did your local university start?" was put in the inception category, with the questions on the year of establishment, and "Do you have the constitution?" was put in the mission category. The two questions "What distinguishes your branch from other U3A/SU branches?" and "What distinguishes SU from other types of learning institution for older people?" were placed at the end of the questionnaire, in a new category named 'uniqueness of U3A/SU'.

With regard to the distribution and collection of members' questionnaires in the UK, a total of one hundred and sixteen questionnaires were distributed (as organised by the Chairpersons) and sixty-two questionnaires were returned (see Table 3-9). The return rate was fifty-two per cent. Although, only three institutions (HL, WF, MT) were examined for institutional development and management, the members' questionnaires were distributed to other U3A groups (BL, RD, LS). In Korea, eighty-four questionnaires were returned out of those distributed to one hundred members. The return rate was eighty-four per cent (see Table 3-9).

Table 3-9 The distribution and Collection of the Members' Questionnaire

	UK		KOREA	
Period	June 06 ~ July 06		February 07 ~ May 07	
No. of distributed questionnaires	116		100	
Returned questionnaires	62		84	
Return rate	52 per cent (62/116)		84 per cent (84/100)	
No. of distributed questionnaires by locality	HL (London)	40	MA (Seoul)	40
	WF (London)	20	KD (Seoul)	30
	MT (London)	6	SC (Seoul)	30
	BL	20		
	LS	15		
	RD	15		
`		116		100

3.10 ANALYSIS OF DATA FROM QUESTIONNAIRES

The data coming from the questionnaire responses have been analysed by content analysis methods. Content analysis is a research tool used to determine the presence of certain words or concepts within texts or sets of texts. By quantifying the use of different words and concepts, the meanings and relationships among these can be revealed, and inferences may be made about the messages within the texts. (Note that texts can be defined broadly as any occurrence of communicative language in written or verbal form). To conduct a content analysis, the text should be coded, or broken down into manageable categories on a variety of levels (Krippendorff, 2004).

In this research, there were two types of questionnaire, each of which combined multiple-choice and open-ended questions. For the institutional questionnaire, all the responses were coded in a spreadsheet program (Excel), organsied by question number. The number of cases was just three for each country; therefore, in order to get an overview of the general differences, the data were re-organised by category. A simultaneous comparison was made, supplemented by interview and observation records. In the case of the members' questionnaire, because of the number of questionnaires involved, it was not sufficient to display and compare all the data directly. Therefore, after all the data was entered in a spreadsheet, organised by question number, the frequency and percentage of the multiple-choice responses were calculated by SPSS. The responses to open-ended questions were sorted according to word use and the frequency and percentage of these were counted manually. Then, the data for UK and Korea were compared, to obtain an overview of the general tendency of participants' responses. In keeping with the study's focus, statistical significance and exact numbers were not seen as very important. The required information was therefore captured in the form of frequencies and percentages.

The short answers were grouped together and the frequency of these was counted. Responses to open questions in the questionnaires were transcribed and analysed

by the stages suggested by Cohen et al. (2000, p. 282), for example:

- Generating natural units of meaning;
- Classifying, categorising, and ordering these units of meaning;
- Structuring narratives to describe the interview contents;
- Interpreting the interview data.

3.11 ETHICAL FRAMEWORK

An ethical framework was adopted for this study, in accordance with the requirements of the Institute of Education, based on the "Revised Ethical Guidelines of the British Educational Research" (BERA, 2004) were adopted. The underpinning principle of BERA 2004 is that all educational research should be conducted within an ethics of respect for the person, knowledge, democratic values, the quality of educational research, and academic freedom. "The underpinning aim of the guidelines is to enable educational researchers to weigh up all aspects of the process of conducting educational research projects within any given context (from student research projects to large-scale funded projects) and to reach an ethically acceptable position in which their actions are considered justifiable and sound" (BERA, 2004, p. 3).

In my interviews and field visits, I clearly explained what I was doing and assured participants of the anonymity and confidentiality of their responses. The cover letter included the aims of research, expected benefits of the research, contact details of the researcher, confidentiality of the data and the likely duration of the research, stating that I would send the results of the research upon request. Similar information was placed in the covering page of the questionnaire. Before asking for personal information, I emphasised the following statements: "This will be used for research purposes. All information is confidential. If you do not feel comfortable doing this, please tell the interviewer". Although it was not written in the cover letter of the questionnaire, the participants' right to withdraw from the study was discussed clearly with participants prior to the administration of the

questionnaire.

3.12 SUMMARY

As stipulated by its methodology and methods, this study is a comparative study that mainly used document analysis and questionnaires as data sources. This chapter began with laying down the methodological point of view of a comparative study. Bray (2004) listed the categories of people who undertake comparative studies of education: parents, practitioners, policy makers, international agencies, and academics. The purpose of this study falls into three categories: academics that develop theoretical models that promote an understanding of the forces shaping the teaching and learning process in different settings, practitioners who aim to improve their institution and policy makers who wish to identify ways to achieve their objectives. I then examined the historical development of comparative education studies, from roots in overseas visits and borrowing of ideas and practices to improve the national systems of education in Western countries in the nineteenth century, to the present day.

This research adopted the multi-faceted analysis proposed by Bray and Thomas (1995), with four 'cubes'. Cube A is the integration of the third age, the country, and the development of each institution; Cube B is the integration of the third age, local institutions and management; Cube C is the integration of the third age, local institutions and the teaching and learning orientation; Cube D is the integration of the third age, individuals and their learning experiences. Each cube is related to one of the research questions.

For the data collection, two questionnaires were developed: one for institutions and another for institution members. The institutional questionnaire was based on the taxonomy of Manheimer, and the member questionnaire draws upon the theory of Cross (1981). Along with the questionnaire survey, document analysis and interviews complemented the data. To check for conceptual equivalence whilst working with different languages (English and Korean), back translation

was carried out. The focus was placed on cross-cultural and conceptual aspects, rather than on linguistic/literal equivalence. A pilot study was carried out, focused on small-scale pre-testing of questionnaires. For the main study, three U3As in London and three SUs in Seoul were chosen as field sites and field visits were undertaken in 2006 and 2007. The data of the questionnaire responses was analysed with a spreadsheet and statistical software (SPSS) to understand the general tendencies of the two types of institutions and participants.

CHAPTER FOUR: SOCIETAL CONCERNS ABOUT THE LEARNING OF OLDER PEOPLE IN THE TWO COUNTRIES

4.1 INTRODUCTION

As a background to the findings of this thesis, I shall discuss the reasons why the learning of older people is receiving worldwide attention and shall also explain the reasons why older people have historically been excluded from learning policies. In this chapter, the importance of learning for older people will be examined, and the reasons why they have been alienated from learning policies will be covered in Chapter Five.

Two social trends that promote the importance of learning for older people arise firstly from debates about lifelong learning in a 'learning society' and, secondly from concerns about older people in an 'ageing society'. Conceptually, the discussion of lifelong learning may be justified from a life-course perspective, and also from a practical perspective, in terms of the various benefits of learning for older people. Consequently, the ageing population phenomenon has compelled administrators worldwide to focus on older people, which means that social concepts about old age have changed. In the following, the term 'learning' with respect to older people will refer to all kinds of 'learning programmes and learning activities', which are open to older people and which older people participate in.

In this chapter, I will start by reviewing the concept of lifelong learning and this will be followed by a discussion of the benefits of learning, by studying the ageing phenomenon in two countries and changing conceptions of the 'third age' and 'life course'.

4.2 THE CONCEPT OF LIFELONG LEARNING AND THE BENEFITS OF LEARNING

4.2.1 Conceptual Inclusion of Older People in Lifelong Learning

The concept of lifelong learning supports the expansion of learning opportunities for older people. A definition of 'learning society' by the ESRC (1994) shows that it includes older people conceptually:

> *[A learning society is] one in which all citizens acquire a high quality general education, appropriate vocational training and a job (or series of jobs) worthy of a human being while continuing to participate in education and training throughout their lives. A learning society would combine excellence with equity and would equip all its citizens with the knowledge, understanding and skills to ensure national economic prosperity and much more besides… Citizens of a learning society would, by means of their continuing education and training, be able to engage in critical dialogue and action to improve the quality of life for the whole community and to ensure social integration as well as economic success (ESRC, 1994, p. 2).*

In the definition above, there are a number of points which should help to clarify our understanding of the term 'learning society'. First, the beneficiaries of a learning society are all of its citizens. Second, the contents of learning can be both general education and vocational training. Third, the intention of creating a learning society is concerned with ensuring social integration and economic success by giving people the chance to develop their knowledge and skills. This has significant implications. Firstly, it is apparent that the idea of a learning society provides a rationale for lifelong learning, for the democratization of education and the broadening of access to learning opportunities. Secondly, it can be argued that in a learning society there should be movement to look for learning opportunities beyond formal educational environments, and to locate learning as a quality not just of individuals but also as an element of systems (Smith, 2000).

According to Evans (1991) and Findsen (2005), three fundamental concepts comprise lifelong learning, namely 'vertical integration', 'horizontal integration', and the democratization of the education system in the context of a 'learning society'. Vertical integration is the continuous learning process in all phases of life and including both older and younger people (ie. lifelong learning). Horizontal integration, on the other hand, entails developing equal learning status across formal, informal, and non-formal contexts (so-called life-wide learning).

The concept of learning society has been a subject of policy debates in various countries since Faure published "Learning to Be" in 1972. Lifelong learning was initially discussed as individual-centred but later the need was discussed to prepare future generations by initiating reforms in the education of the general society (Merricks, 2001, p 6). This can be defined as developing a society that learns about itself , which requires changing learning methods in such a way that all members of the society are learning, based on a democratization of learning conditions (Ranson, 1998b, p. 2).

One major feature worth noting about this discussion is how learning itself became attributed to individuals, and embracing an array of corporate qualities. Although learning theory mainly emphasizes learning that manifests in individual lives, continuous learning is also linked with communities, organizations, and society itself (Griffin and Brownhill, 2001, p. 55). Moreland (1999) marks the distinction between 'lifelong learning' and 'learning society'. The two terms are usually used interchangeably but Moreland notes that 'learning society' stresses *'where'* learning takes place, whereas 'lifelong learning' focusses on *'when'* learning takes place. Green (2000) also tries to differentiate the two terms, arguing that 'lifelong learning' refers to the distribution of learning opportunities in one's lifetime, while 'learning society' describes that these opportunities should be enjoyed by everyone in all areas of society such as homes, schools, workplace, and the community. In this thesis, I follow this interpretation so that 'learning society' is more concerned with space rather than time, and is more horizontal than vertical in nature. Further to this, Smith (2000) argues that a learning society

should be part of a movement that looks beyond formal educational environments, and views learning not only as an individual quality but also as an element of social systems. Van der Zee (1998) also affirms this proposition, with the idea of a learning society where learning is a cultural dimension: each citizen is entitled to participate in any learning activity, whether it provides general, liberal, or vocational education, and involving various social agencies:

> *A learning society stimulates and allows all its members and groups continually to develop their knowledge, skills and attitudes. Education is anchored in culture as a primary condition of existence. It is high on the agenda of many societal institutions. Besides the educational system proper, numerous other agencies are involved – the mass media, the unions, industry and commerce, the health services, travel organisations, public information outlets, prisons, and so on. This is what I mean by education as a dimension of society (Van der Zee, 1998, p. 62).*

Hutchins published the first book on the learning society in 1968 and his major thesis was that the development of a learning society was becoming essential because of the social changes experienced in that period, where many people were having more time available to study and learn through their lifetimes. As a comparison he cited the case of ancient Athens, where the abolition of slavery enabled citizens to participate in city life. His perspective of a learning society is based on classical humanism, which gives intrinsic value to learning and education. Schön (1973) argues that the creation of a learning society is necessary to understand and manage growing societal transformations:

> *We must, in other words, become adept at learning. We must be able not only to transform our institutions, in response to changing situations and requirements; we must invent and develop institutions which are 'learning systems', that is to say, systems capable of bringing about their own continuing transformation (Schön, 1973, p. 28).*

Boshier (1980) perceived social drivers for the learning society arising from a sense of inadequacy among academic institutions and unparalleled societal

changes associated with computer and digital technologies perceived at that time. In his book, "Towards a Learning Society," he focuses on the critical role of adult education in creating a learning society:

> *A full functioning lifelong education system will result in the creation of a learning society, where adult education and learning are normal and common place, not the exclusive preserve of childhood or adolescence but an inherent right of all citizens, as inalienable as clean water and good shelter. In a learning society, the educational institutions will no longer have a monopoly on education but will be linked with informal systems to provide continuous learning for all (Boshier, 1980, p. 1).*

According to Torsten Husén, the state should ensure that learning societies can meet the needs of a dynamic society as knowledge and information now play a bigger role in our lives. Husén (1974), who had worked as a researcher in educational reform in Sweden and as a government adviser since the end of the 1940s, highlighted the need to view education in a wider context. He upholds the principle of reforming traditional schools while Hutchins anchors his perspective in the concepts of adult and continuing education. Husén argued that 'the task of reforming education to meet the need of a changing society required a critical review of the institutionalised nature of schools, without moving to the extreme path of 'de-schooling' (Ranson, 1998b, p. 4). Such a perspective is grounded in the concept of adult and continuing education and also on 'integrated provision of education accessible to all over the whole of the life time' (Griffin and Brownhill, 2001, p. 58).

The issue for definition in the field of educational gerontology lies in how its concepts are linked with lifelong learning and the learning society. It raises the basic concern as to why society should think about the provision of education for older adults. Findsen (2005, p. 19-20) discussed four responses to this question. One response focuses on the ways in which education can improve the citizen's quality of life and that includes older adults. Another highlights the rights of older adults for equal educational opportunity. This position has been promoted in the

UK through the "Older and Bolder" project of the National Institute for Adult and Continuing Education (NIACE), a policy paper promoting the educational rights of older people ("Learning to grow older & bolder", 1999). A third response associates educational opportunity with human dignity and moral respect. Emphasising the importance of human dignity and potential, Withnall and Percy (1994) argue that age is irrelevant as a basis for assessing one's contribution to society. According to Elmore (1999), in order to strengthen active democratic participation and equality of status in citizenship for older adults, educational gerontology should be utilised. Finally, the concept of intergenerational recognition and reciprocity is also valuable, an approach used by developmental psychologists. In the same vein, Laslett (1996) asserts that a self-fulfilled life is characterized by older people taking responsibility for themselves and their learning as well as taking up the task of sharing with the younger generation to establish an equitable relationship for the future.

To summarise, the learning of older people has been aligned with the concept of lifelong learning and the learning society. From the vertical point of view, learning of older people is integrated within the educational system, and from the horizontal point of view, informal or non-formal learning, which most older people consider appropriate for themselves, are integrated into the concept of lifelong learning.

Besides the more theoretical debate about the concept of lifelong education discussed above, the practical importance of learning for older people has been recognised and debated. The next section summarises the reports on the practical benefits of learning in later life.

4.2.2 Benefits of Learning in Later Life

Laslett (1996) notes that although common preventive health programmes for older people include nutrition and physical exercise, the benefits of cognitive stimulation in later life are well appreciated. Schuller et al. (2001) examined the

benefits of learning in relation to ageing in four categories: physical and mental health; intellectual stimulation, competence and skills; quality of life, empowerment and self-confidence; personal and social value and social networks. Learning experiences facilitate the adjustment to ageing; provide stimulation of the brain; and enactment of new roles, e.g. community volunteers, grandparents and carers (Davey and Jamieson, 2003, p. 267). People who are involved in learning enjoy the benefit in terms of their own health and well-being; they lead a more active social life and they are more immersed in the community (Dench and Regan, 2000).

McClusky (1976) thinks of education as a prevailing force that drives older adults to aim for and maintain personal well-being and autonomy. Recognising the fact that education is an important human right, and that older adults should be credited for their significant contribution to social development, Havighurst (1972) called for the need to offer educational opportunities for older learners. As early as 1926, Lideman had perceived learning as a natural process that allows people to deal with changes and to find purpose in their lives. Moreover, Moody (1990) noted that learning is vital to meet the varying needs of adults, and giving the "hope of growth and continued meaning in the last stage of life" at the same time (p.5). Therefore, an education that serves to alleviate deprivation and prepare people for the latter stages of life should be a lifetime goal (Glendenning and Battersby, 1990). Five reasons why policymakers, the general population, and the elderly themselves should acknowledge the significance of late-life education are enumerated by Groombridge (1982). First, education can foster self-reliance and independence of the elderly. Second, education enables older people to deal with many problems in a complex and dynamic world. Third, education strengthens the actual or potential contribution of older people to society. Fourth, older people's self-awareness, interpretation, and communication of their experiences to other generations spawns an enriched perspective about the valuable things in a rapidly changing world. Fifth, education is important for many older people, who strive for expression and learning. This list stresses the increasing role of education in reducing dependence by the rapidly growing older population on public assistance

(Swindell and Thompson, 1995).

In contemporary research about ageing and later life, older people are considered as active participants and a heterogeneous group different from the prevailing social group. Opportunities to participate in leisure activities are necessary to seniors' psychological and physical well-being (Gibson, 1988; Russell, 1987). The next section will consider the factor of the increasing numbers of older people (in the two identified countries) which has led to increased attention on learning.

4.3 THE INCREASING POPULATION OF OLDER PEOPLE: THE AGEING PHENOMENON IN THE UK AND SOUTH KOREA

The fast expanding numbers of senior citizens worldwide triggered off an increased attention towards older people. This led to a change in the way 'old age' was perceived as well as a move towards a different view of educational opportunities for older people. I will review the current trend of ageing in two countries in this section, the changing concept of being old, and (in the next section) the reconceptualisation of the life course.

The ageing of the global population has attracted considerable attention, especially after the United Nations organised the first World Assembly on Ageing in 1982. At the same conference held twenty years later in 2002, it was notable that as many developing countries as developed countries were facing the problem of rapid ageing, whereby the typical elderly population of developing countries was predicted to reach 14 per cent and 21 per cent in less than 20 and 30 years, respectively.

From the social perspective, the term 'ageing' means simply that the average age of the population is increasing along with the proportion of older people within the total population. The following projection made by the United Nations Population Division illustrates the demographic changes ahead (UN, 2002). Over the previous fifty years, the median age of the world's population increased by

only three years, from 23.6 in 1950 to 26.4 in 2000. But over the next fifty years, the median age will jump to 37. For instance, in France, the median age will rise from 38 in 2000 to 45 in 2050. In developing countries, the median age is also rising sharply, albeit from a much lower base. The change of demographic regime is clear for Malaysia, the Republic of China, and Thailand where the population that is over sixty years of age will reach about thirty per cent, a share similar to what is expected for the post- industrial societies, except Japan, where the people aged over sixty will represent about forty-two per cent of the total population in 2050.

In 2010 in the UK, there were nearly 12 million people of state pension age (currently 60 for women and 65 for men), almost 1 in 5 of the total population. There are now more pensioners than there are children under 16. Over 1.3 million people are aged 85 or over. For the first time in UK history, there are now over 1 million men aged over 80. The number of people aged 65 years and over is expected to rise by 65 per cent in the next 25 years to 16.4 million in 2033 (AGE UK in 2010, http://www.ageuk.org.uk/).

According to the commonly-used UN definition, societies where the proportion of the population aged sixty-five and over is greater than 7 per cent, 14 per cent, or 20 per cent are respectively called 'ageing societies', 'aged societies', or 'super-aged societies'. Korea entered the state of being an ageing society in 1999. Within less than twenty years (in 2020), Korea is expected to become an aged society, with its projected old-age population over fifteen per cent (KNSO, 2005b).

The first factor to consider in examining the ageing phenomenon is the speed of transition from ageing to aged societies. The speed is extraordinary, given the historical experience of Western societies (see Table 4-1). France took one hundred and fifteen years, for example, to move from an ageing to an aged society, while for the USA this took seventy-one years. Among the most industrialized countries, Japan has experienced the fastest transition to an aged society, but Korea is expected to be faster than Japan (KNSO, 2005a). The UK became an

ageing society in 1929 and an aged society in 1976, faster than Korea by forty-two years and it is projected to become a super-aged society in 2021. Compared to Korea, the ageing phenomenon has happened more steadily. During the last decades of the 20th century, Korea had the youngest population among the OECD countries, but it is now expected to undergo a rapid ageing process over the next decades, predominantly due to its economic development. Korea is likely to experience one of the most rapid demographic transitions from an ageing to an aged society. Jaegwan Byun (2004) called the rapid ageing phenomenon in Korea 'intensive ageing'.

Table 4-1 Population Ageing Rate by Selected Countries

Year when population aged 65+ reaches:			Years taken for change	
	7 per cent	14 per cent	20 per cent	7 per cent→ 14 per cent	14 per cent→ 20 per cent
Korea	2000	2018	2026	19	8
U.K.	1929	1976	2021	47	45
U. S.	1942	2013	2028	71	15
Germany	1932	1972	2012	40	40
Japan	1970	1994	2006	24	12
France	1864	1979	2020	115	41
Italy	1927	1988	2007	61	19

(Source: KNSO, 2005a, p. 10)

The rapid growth of the elderly population results in part from rapid increases in life expectancy (the other factor being fertility rates – see below). Life expectancy at birth is an estimate of the average number of years a newborn baby would survive if he or she experienced the country's age-specific mortality rates for that time period throughout life. In Korea, the life expectancy for men and women in 1960 was 51.1 and 53.7 years respectively, increasing to 67.7 and 75.9 years in 2000. Life expectancy is forecast to be 79.2 and 85.2 years in 2030 and 80.7 and 86.6 years in 2050 (KNSO, 2005b). This trend in Korea is considered remarkable compared to that in other countries. In the UK, life expectancy is also increasing. For a comparative analysis of the data on life expectancy, the World Health Organization (WHO) statistical information system (http://apps.who.int/whosis/data/Search.jsp) was used and the results are shown in

Table 4-2). Females live longer than males, but the gap is closing. In 2006, the life expectancy of Korea was the same as that of the UK. The UK, however, had a lower healthy life expectancy at birth and a smaller percentage of life expectancy without disability than the average of the 15 European Union countries in 2003 (AGE UK in 2010, http://www.ageuk.org.uk/).

Table 4-2 Life Expectancy in Korea and in the UK

Year	Korea			UK		
	Both	Male	Female	Both	Male	Female
1990	72	68	76	76	73	78
2000	76	72	80	78	75	80
2006	79	75	82	79	77	81

(Source: WHO, 2010, p. 48)

Life expectancy can also be related to mortality statistics. According to the data of ONS (2004) in the UK, over the last 30 years death rates for men have fallen faster than those for women, but men still have higher rates than women at all ages. Death rates increase with age, from 8 per 1,000 men aged 50 to 64 to 188 per 1,000 men aged 85 and over (England and Wales in 2002). The most common cause of death for people aged 50 to 64 was cancer. Overall, for 39 per cent of males, and 53 per cent of females, deaths in this age group were due to different types of cancer. Lung cancer was the most common cause of death for men, and breast cancer for women. For those over the age of 65, circulatory diseases are the most common causes of death. Within this age group, heart disease as a cause of death decreases with age, while cases of stroke increase. Pneumonia as a cause of death also increased with age, accounting for one in ten deaths among those aged 85 and over (http://www.statistics.gov.uk/cci/nugget.asp). The trend of fertility rates[3] is a consistent decline, in both countries. The trend in many countries was a

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[3] On OECD website, the term 'fertility rate' refers to the number of children that would be born per woman, assuming no female mortality at child bearing ages and the age-specific fertility rates of a specified country and reference period (http://stats.oecd.org/glossary/detail.asp?ID=946).

'baby boom' in the 1950s-60s, and a subsequent decrease in fertility rates, which strongly contributed to the ageing of the population. In Korea, during the thirty years before 2003, the fertility rate dropped more than any other of the OECD countries, as shown in Table 4-3. The figure for 2003 is now among the lowest in the world (the OECD average is 1.62). In the case of the UK, the fertility rate dropped below 2.0 in 1975 but until now it has not significantly changed. The steep decrease in fertility rate is one of the great social problems facing Korea.

Table 4-3 Change of Fertility Rates in Selected OECD Countries

Country	1970	1975	1980	1985	1990	1995	2000	2001	2002	2003
Korea	4.53	3.47	2.83	1.67	1.59	1.65	1.47	1.30	1.17	1.19
UK	2.43	1.81	1.89	1.80	1.85	1.71	1.64	1.63	1.64	1.71
U. S.	2.46	1.80	1.84	1.84	2.08	2.02	2.13	2.03	2.01	2.04
Germany	2.03	1.48	1.56	1.37	1.45	1.25	1.38	1.35	1.31	1.34
Japan	2.13	1.91	1.75	1.76	1.54	1.42	1.36	1.33	1.32	1.29
France	2.47	1.96	1.99	1.83	1.78	1.71	1.88	1.84	1.89	1.89
Italy	2.43	2.14	1.61	1.42	1.33	1.19	1.224	1.23	1.26	1.29

(Source: KNSO, 2005a, p. 14)

The next factor in examining the ageing phenomenon in the two countries is the old age dependency ratio (OADR), which measures the number of people, aged 65 and over for every 100 people aged 15 to 64. It is an indicator of the ratio of older people to adults of working age within a country's population. This is a *demographic* measure and is not an indicator of the economic support ratio of a country, since many younger people delay joining the labour market to remain in education, and significantly many older people are working past the standard retirement age of 65. Table 4-4 shows that the OADR in the UK is projected to rise from 24 in 2008 to 39 by 2035 and in Korea will increase from 14 in 2008 to 36 by 2035.

Table 4-4 Old Age Dependency Ratio in 2008 and in 2035, in selected countries

Country	2008	2035
Korea	14	36
UK	24	39
U. S.	19	33
Germany	30	53
Japan	34	57
France	25	42
Italy	30	48

(Source: Matheson, 2010, p. 15)

The ageing phenomenon does not just mean the increase in the number of older people. It also involves the concept of the extension of the life course into later life, and changing conceptions of being old. The next section examines these changes.

4.4 CHANGING CONCEPTIONS OF THE THIRD AGE AND THE LIFECOURSE

I will review first the traditional perspectives on old age and being old and then will examine the relationship between the introduction of retirement in industrialised society and the emergence of the 'third age'. This leads to the currently changing conceptions of life course and life transition.

4.4.1 Traditional Perspectives

The traditional perspective, during the 20th century, involves the perception that old age starts from age sixty-five, and thus those aged sixty-five and over should disengage themselves from the mainstream labour market and society.[4] Activities and roles in the life course are usually determined by age-related (conventional)

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[4] In the UK, women's official retirement age was 60 officially until 2012 and many men also retired before 65 if they could do it financially.

norms, with little consideration of extending life spans and an ageing society. In the traditional perspective, people tend to generalise that an ageing population is a 'burden', a 'danger', and a 'demographic time bomb'. This draws on a dominant biomedical model that old age is a process of inevitable physical and mental decline.

Lee (2010) reports a research study that surveyed public opinions about what people think about 'older people' in Korea. 37.5 per cent agreed that the term 'older' refers to men and women who are over sixty years; 33.9 per cent over sixty-five years; 1.3 per cent chose over seventy years. The reason for considering those over sixty as older people probably results from the fact that in Korea, there is a cultural expectation to proudly recognise and celebrate one's sixty-first birthday, as the moment of entering into the later period of one's life. The significance of sixty-five years is probably influenced by the 'Elderly Welfare Law' in which many legal provisions, such as old age pensions and concessions, are applied in Korea to those who are over sixty-five. However, the 'Law for Promoting the Employment of Older People' regards all those who are over fifty-five as older people. In this law, there is also the notion of 'quasi-older people' who range from fifty to fifty-four. This can be compared with the UK, where generally the term 'older people' in social policies refers to 'pensioners', who are females over sixty and males over sixty-five.

For more than a century, old age and the standard age of retirement (voluntary or non-voluntary) has been defined at sixty-five years according to the traditional perspective of industrialised countries. This standard age of retirement has been one of the most important determining factors for excluding workers from mainstream social systems, and a resulting social indifference towards this population deprives them of the opportunity to enjoy and appreciate the meaning of life in older age.

The traditional perspective, that excludes those aged 65 and over by declaring them as 'non-productive' without reasonable evidence for this exclusion, has

actually contributed to an increase in societal burden by prematurely making older people welfare recipients of pensions or public assistance. This phenomenon has been a serious social issue in developed countries like the UK. Moreover, the extended lifespan of recipients may lead to a depletion of pension funds (pension wealth) over time, and threaten the sustainability of pension systems or social security systems.

The conventional age-graded norms have also determined the sequential path of education, work, and non-work (leisure). In general, education is seen as a full-time activity at young age, work is a full-time endeavour for young and middle-aged adults and non-work for older people. However, the experience of the past several decades is quite different from the traditional perspective, with education, work and leisure co-occurring without specific sequence (O'Rand, 1996).

Glendenning (2000) stresses how the traditional perception of older people is rife with confusions, misunderstandings, and lack of knowledge about old age. Chronological age (the simple number of years one has lived) is considered a myth by some experts since physiological factors show a greater range in old age than in other age groups, and the same trend applies to personality (Glendenning, 2000, p. 41).

Butler (1975, p. 6-16) tackles the myths and stereotypes of old people and identifies several misconceptions:

- The assumption of unproductivity. This is a myth, because countless people become unusually creative for the first time when they are older.
- The myth of disengagement (which gained great currency in the 1960s as a result of a book by Cumming and Henry, "Growing Old", 1966). The myth that after retirement, older people prefers to disengage from activities in society, and that this is a natural part of the ageing experience. But there is no evidence to support this theory, and disengagement is only one reaction to growing old.

- The myth of inflexibility, which actually has little to do with age and more to do with character formation.
- The myth of senility – the notion that older people are forgetful, experience confused episodes and have reduced attention. This is a popular view held both inside and outside the medical profession, in an attempt to categorise the behaviour of older people. However, there is often confusion between brain damage and other mental and emotional problems in later life.
- The myth of serenity, which portrays old age as an adult fairyland in which people enjoy peace, relaxation and serenity. But older people experience more stresses than any other age group, with depression, anxiety, anger, chronic discomfort, grief, isolation and lowered self-esteem.

Unpacking these myths and making efforts towards reconsidering these on evidence-based grounds, forms an important part of my own research work. I thus will use Butler's (1975) myths as a point of departure for rationalising the need for a fresh perspective on dealing with the Third Age, in the next section.

4.4.2 The Emergence of the Third Age and the Necessity of a New Perspective

The global labour force structure is constantly changing; the nature of work itself is in flux, as governments seek to have an 'up-skilled' and competitive workforce.

The concept of retirement has undergone changes in the USA and Europe largely as result of socio-economic changes in labour force participation. For example, in the UK in the 1950s and 1960s, people left their jobs at age 65 (or 60 for women) and started receiving their pension. However, the age where people may choose to leave their jobs depends on a range of factors – redundancy, voluntary severance, flexible retirement policies, disability, and caring duties. Medical improvements enable people to live longer lives and enjoy better health, which the change in age structure, patterns of employment, and health conditions (Phillipson, 1998). In medical terms, people may be classified as 'elderly' are 80 years old and over,

whereas those under the age of 80 are still considered 'middle-aged' (Withnall, 2002, p. 88).

Consequently, we have seen over the last three decades the development of the concept of the 'young old' or the 'third age' – characterised by a period of leisure and personal fulfilment before entering 'fourth age' marked by dependence, senility, and death.

The term third age was originally intended to start from the age of 60/65 ; more recently, it has come to be applied to those over 50 in, thereby confirming the artificiality of the statutory retirement age, against the social backdrop of changing patterns of redundancy and early retirement (Glendenning, 2000, p. 1).

The definition of the stages of the life course has been evolving. For instance, according to Schuster & Ashburn (1980), in the mid-twentieth century, the maximum range for middle age (middle adulthood- the stage between young adulthood and older adulthood) was set at 65 years.

As life expectancy reaches eighty and above, middle age may need to be extended beyond the age of 65, and the starting point of older adulthood may have to be raised to 70 or even higher. The period of 'old age' needs to be sub-divided to establish appropriate societal roles for those aged 65 to 100. In the book "A Fresh Map of Life", Peter Laslett (1996) tackles the demographic and sociological changes of the 'Third Age.'[5] He notes that until the first half of the twentieth century, adults used to spend the major part of their lives in the second age, which includes working and caring for families followed by a period of dependency and decrepitude. In the 1950s, however, major changes transpired. For the first time in

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[5] "The third age is a phrase of French or Spanish origin, and was used to identify 'Les Universites du Troisieme Age' when they began to be instituted in those countries in the 1970s. It seemed to have entered the Anglo-Saxon vocabulary when the first of the British Universities of the Third Age was founded at Cambridge in the summer of 1981. Because of the spread of these societies in the United Kingdom and elsewhere, perhaps also because of the perennial need for a term to describe older people, a term not already tarnished, the expression is now in fairly common use" (Laslett, 1996).

history, the majority of older people in industrialised countries began to enjoy healthy, active, and self-fulfilling years through a combination of compulsory retirement, generous pensions, and increased life spans. Hence, the third age is the result of the demographic expansion of retirement-age individuals, economic security, health care advances, and the changing attitudes of and toward older adults. Laslett emphasises that the third age "is an attribute of a population, indeed of a nation, as well as of particular men and women" (cf. Manheimer et al., 1995, p. 63). Although the 'third age' continues to be a debatable subject, Laslett's description – marked by personal fulfilment, following the second stage of independence (maturity, responsibility, earning, and saving) and preceding the fourth age of final dependence (decrepitude and death) – is broadly cited.

According to Laslett (1996), the new era of leisure must enable people of all classes to deepen their sense of culture and engage themselves in educational activities that would enable the improved appreciation of art, history, philosophy, music and other valuable subjects of learning. In the absence of educational involvement, the third age would "turn out to be indolence indefinite." Furthermore, Laslett also recommends that third age learners should teach each other.

The Carnegie Inquiry (Schuller & Bostyn, 1992) defined the third age as the active independent stage in life after someone has finished his or her career, or the raising of children, or both. The terms used in the report are 'third agers', or 'older adults' and 'older learners'. With regard to educational participation, Schuller (1989) recommends the term third age instead of older people because if the goal is to provide opportunities for people to become active participants of society, we should take into account all people who are able to or need to learn.

The term third age includes both individual and societal values, and the difference between these is often blurred. In the United States, the term refers to a time of life of continued activity, social involvement, and productivity of retirement-age individuals. This definition is centred on attitude and outlook on life (Manheimer

et al, 1995, p. 62). People officially enter third age upon finishing their career in the sense that they are no longer primarily involved in earning a living as a responsibility, although this does not preclude the fact that people might still be involved in or actively seeking some kind of paid work (Withnall, 2000).

Over the past decade, a new positive concept of ageing has surfaced from both medical studies and educational gerontology, where the creative and learning potential of people in the third age is becoming more accepted.

Choi , S. (2006) enumerates reasons for the need to develop a new perspective on life course and ageing. Most importantly, the traditional perspective does not fit to the reality of an ageing society. A modification of perspectives and theories is required. Many theories on life course and ageing are not grounded on the premise that human lifespan is rapidly extending and the ageing population is growing.

The traditional approach towards ageing provokes pessimistic ideas (population time-bomb, etc) and the idea of social breakdown. Yet the path towards ageing is inevitable, the challenge for the society is to transform itself in order to build on the strengths of the ageing population in the most desirable ways. Thus, we need to get an alternative perspective about life course and ageing.

In summary, the term 'third age' connotes two important meanings. First, it refers to new emerging social group with distinct characteristics. Secondly, 'third age' does not convey the negative perceptions towards older people that traditional perspectives tend to promote. The rise of the third age has highlighted the need for a new perspective on ageing and life course. In the next section, I will examine the theoretical foundations for such new approaches.

4.4.3 Theoretical Bases for a New Perspective

A new approach to life course and ageing can be grounded in questioning the ideas that underpin prevailing theories. Among such theories, age stratification

theory has proposed that each society classifies people into categories based on age, giving rise to an expectation of different roles being associated with particular age groups (Riely, 1987). New approaches such as life course theory develop on previous theory by arguing for a more complex phenomenon of roles that change across the life course where the development is not restricted to any one part of life and the process involved is instead life-long and highly dynamic (Benston et. al, 1997). Furthermore, this theory asserts that development cannot be merely associated with incremental growth and change but rather is an interactive, non-linear process, simultaneously involving role gains and losses, or continuity and discontinuity.

Thus, by seeing ageing groups as active members of status groups in a dynamic social system, the theory can offer a sociological interpretation of age differences in relation to life course and cohort. Theory such as this can have a significant effect in developing a fresh mindset as it accentuates changing social roles for specific age groups.

Life course theory, on the other hand, tackles the variety of roles and the concomitant changes across the life course, the development of which is not restricted to any one part of life and the process involved is instead life-long and highly dynamic (Benston et. al, 1997). Furthermore, this theory asserts that development cannot be merely associated with incremental growth and change but rather is an interactive, non-linear process, simultaneously involving role gains and losses, or continuity and discontinuity. The theory contributes to the new perspective by proposing life-long and highly dynamic developmental paths.

The new perspective on ageing should embrace the three factors of generational claims, diversity, and longevity. It emphasises a new set of situations that profoundly change public opinion towards ageing and towards the social responses to these challenges (Torres-Gil, 1992). The three factors can serve as a framework for probing into the overall life course, the ageing process, the elderly, and the societal response to the phenomenon.

It is relevant to mention here several vision statements that have been published by the United Nations. The year 1999 was declared as the United Nations' International Year of Older Persons (http://www.unac.org/iyop/unquest.html). Under its vision of 'a society for all ages', it highlighted three principles that should be integrated in social policies, namely (1) independence, (2) participation, and (3) self-fulfilment. In an earlier statement in 1991, the principles proclaimed were: (1) independence, (2) participation, (3) care, (4) self-fulfilment, and (5) dignity. The UN's Madrid International Plan of Action on Ageing adopted at the second World Assembly on Ageing in 2002 focused on three priorities for policy directions: (1) older persons' participation in society and development, (2) advancing health and well-being into old age, and (3) ensuring an enabling and supportive environment. The common factors that can be identified for the UN's policy directions on ageing society can therefore be summed up as (1) independence, (2) participation, and (3) self-fulfilment.

The notion of productive and active ageing was initially based on how it would contribute to economic productivity. However, the definition has been generalised to place a strong emphasis on quality of life, and mental and physical well-being as well as the social and economic aspects (Walker, 2002; WHO, 2002).

The idea of 'successful ageing' as discussed the field of social gerontology is one of the vital dependent variables and developmental goals for later life. Active living that fosters social relationships through productive activities including remunerative and voluntary work is commonly considered as a main determining factor for successful ageing (Walker, 2002). For the new perspective, this view promotes the idea of productive activities being regardless of age.

4.4.4 Changing Conceptions of the Life Course and Life Transition

It is difficult to predict how life after the age of fifty, sixty-five, or eighty will be experienced by future generations at an individual level, and how it will be regarded by social institutions (including religions), businesses, and governments.

Many people in their late seventies and eighties have already outlived their parents by fifteen or twenty years. In some ways, a longer lifetime means not only more years of later life (which is an artificially demarcation anyway), but of mid-life as well. The whole life course is being stretched out like a rubber band (Manheimer et al., 1995, p. 26).

As Crystal and Bolles (1974) point out, the changing life course involves an intermingling of activities rather than a strictly sequential set of 'boxes' − childhood, education, work, and retirement. For example, periods of study, similar to college professors' sabbaticals, may become commonplace in future average life course experiences. The distribution of education, work, and leisure activity may now look something like the blended life plan for the year 2000 that these authors proposed (shown in Figure 4-1) (See also Cross, 1981).
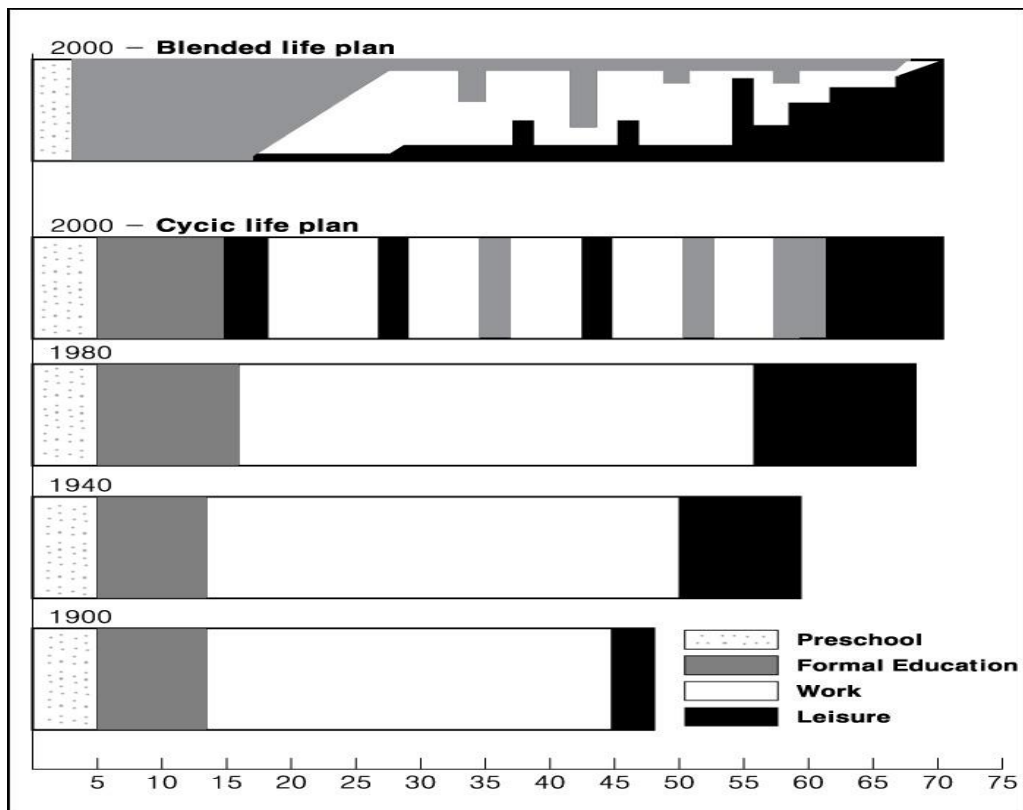
Figure 4-1 The Changing Life Course (from Crystal and Bolles, 1974, p. 18)

There has been discussion about the existence of a 'second middle age' brought about by the increasing life span (Bronte, 1993), specifically for those aged 60 to 75. In the second middle age, individuals' lives are composed of modified activities. For instance, they may perform part-time jobs or 'bridge jobs' to facilitate the transition from a full-time employment to retirement. Meanwhile, they also do voluntary work, live a busy social life, and engage themselves in leisure and cultural activities.

The new flexibility in the sequence of life events and the extended lifespan raise concerns over how future generations will perceive their own ageing. Manheimer et al. (1995) doubts that second middle-agers will be willing to identify themselves as 'senior citizen', 'older adult', and 'senior' and they will find it uncomfortable hearing certain labels such as 'retired persons', going to 'senior centres', or subscribing to magazines especially catering to 'seniors'. These changes are already apparent, such as the re-labelling of centres as 'enrichment centres' and the repackaging of the Fifty Plus magazine as 'New Choices' (Manheimer et al., 1995, p. 28).

Some gerontologists regard the increased longevity and loosened norms for prescribed age-linked behaviours as a reflection of an 'age irrelevant' or 'age liberated' society (Benston, 1997). They do not agree that there are any intrinsic age norms for later life because such norms are socially, economically, and culturally constructed and can thus be reconfigured. Changing age norms will certainly have political effects. Separating age norms from chronological ageing may mean that entitlements like Social Security and Medicare in the USA must not be based on birth date but on the client's needs and economic status. This is a challenge for seniors' interest advocates, who lobby for an improved quality of life for older people. The United States, like many other countries, will have to reflect on their capability and willingness to provide a decent quality of life for the elderly, and the basis of this as an assumed social contract between generations (Manheimer et al., 1995, p. 28).

Some experts on ageing argue that the removal of age stereotyping must be balanced against being realistic about both the strengths inevitable weaknesses and vulnerabilities of ageing. Moody (1998) and Cole (2000) propose the importance of a more holistic view, which focuses on the inter-relationship between generations and between stages of the life course. The holistic view should avoid perpetuating new generalities, and should instead be grounded on those traditional virtues which emphasise dignity, intellectual, emotional, and spiritual growth, as well as the nurturing role of older people towards the young. The role of education in later life, which even involves remaining in the labour force or preparing for a voluntary job, leads to a range of issues about the meaning of later life. The age-segregated society is transforming into an age-integrated society, as suggested by Riley et al (1994) (see Figure 4-2).

Later life	Leisure	Education	Work	Leisure
Adulthood	Work			
Young	Education			
	Age-separation society	Age-integration Society		
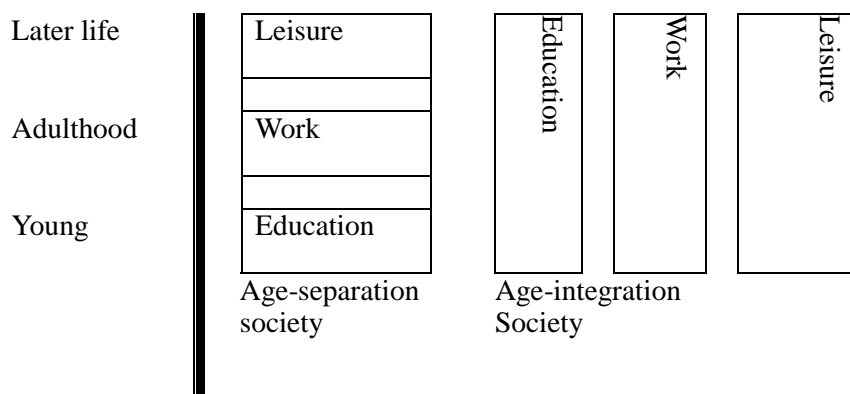
Figure 4-2 Structure of the Life Course (from Riley et al., 1994, p. 26)

4.5 SUMMARY

In this chapter, I have outlined the four major influences on changing ideas about the learning experiences of older people: the concept of lifelong learning; the benefits of learning in later life; the increasing number of older people in society; and the changing conception of being old and the nature of the life course. The first two can be related to the idea of the learning society and last two related to the ageing society. First, the idea of lifelong learning and learning society provides a rationale for broadening access to learning opportunities to all age groups, not only older people. The concept of lifelong learning also expands its

scope to formal, non-formal, and informal learning, and this is very important as older people are involved with non-formal or informal learning much more than formal learning.

Second, the practical importance of learning of older people can be emphasised among the benefits of learning in later life. Schuller et al. (2001) examine the benefits of learning in relation to ageing in four categories: physical and mental health; intellectual stimulation, competence and skills; quality of life, empowerment and self-confidence; personal and social value; and social networks.

Third, I have outlined the current trends of ageing in two countries with a focus on three factors: the speed of ageing, life expectancy, and fertility rate. Overcoming diseases of infancy and childhood in the earlier part of the twentieth century led to dramatic increases in the number of adults who survived to maturity. Medical advances in the second half of the century extended life expectancy in the middle and later part of the life course. The post-war baby boom and a subsequent decline in fertility rates have also contributed to the ageing of the population.

Finally, I examined the changing concepts of third age and life course. There are conceptual changes that recast retirement, the course of life and of transitions in life. Peter Laslett (1996) argues that from the 1950s onwards, a fundamental change began to emerge where a combination of compulsory retirement, pensions, and increased longevity resulted in a greater majority of older people in industrialised countries experiencing many healthy, active, and potentially self-fulfilling years. Laslett's definition of this period of personal fulfillment as the 'third age' − following the second stage of independence, maturity, responsibility, earning, saving, and preceding the fourth age of final dependence, decrepitude and death − is widely accepted.

In the next chapter, I will discuss the idea that learning of older people seems to have been excluded from mainstream learning policies up to now, due to the a political focus on the knowledge-based economy, and the human capital model of learning society.

CHAPTER FIVE: THE POLITICAL AGENDA FOR THIRD AGE LEARNING

5.1 INTRODUCTION

The purpose of this chapter is to examine learning policies in relation to older people. In the previous chapter, I examined the ageing phenomenon and the increasing discussion about the learning society and lifelong learning. In chapter one, I argued that learning institutions of older people such as those offered by U3A or SU have emerged to compensate for governmental policies and provisions that have not considered older people sufficiently, even in a fast evolving context where the ideas of ageing society and learning are widely discussed. Therefore, it is important to investigate in detail the situation of learning of older people in terms of policies and provisions in the UK and South Korea.

This study started with a perception of lack of educational support in educational policies and provisions for older people in 2001, and I argue that the lack of attention of governmental policies and provisions is the basis for the importance of non-credit learning organizations established by older people themselves. The analysis of this chapter is focused on documents and policies mostly before 2004 or 2005. Given that the purpose of this study is to compare learning of older people of U3A in the UK and SU in South Korea, further supplementary analysis of documents and review of provisional programmes for older people is made, as applicable.

Before examining the specific question of exclusion of older people from learning policies, I would like to review the general situation of learning policies and learning provisions for older people in each country. Later, I will argue that a key reason why younger people are given more attention than older people in learning policies is due to the prevailing political context of a 'knowledge-based economy'.

5.2 POLICIES AND PROVISIONS OF LEARNING PROGRAMMES FOR OLDER PEOPLE

In this section, I would like to briefly examine the learning policies and learning provisions for older people in the two countries, to obtain a general picture of learning programmes for older people.

5.2.1 Policies and Provisions in the UK

In this chapter, for the categories of learning provision for older people I draw on two reports from the UK: "Learning: Education, Training, and Information in the Third Age" (Schuller & Bostyn, 1993); and "Learning To Grow Older and Bolder" (Carlton & Solusby, 1999). Schuller and Bostyn differentiated learning provisions into three sub-domains of 'education', 'training', and 'information'.

In examining learning provisions, the main focus here will be the education domain as investigated by Schuller and Bostyn. They arranged educational provisions along a continuum from formal to informal : universities; the Open University; the National Extension College; further education colleges; Local Authority (LA)[6] adult education; the Workers' Educational Association; the Pre-retirement Association; the University of Third Age; and organizations promoting learning activities among older adults. Similarly, Carlton and Solusby examined learning provisions in their report under the categories of local authorities, further education sector, higher education sector, the voluntary sector, information technology, and broadcast media. Juxtaposing the two reports, I will examine learning provisions using the categories of general policies, local authorities, the further and higher education sector, and the voluntary sectors.

General Policies

In the UK, the 'New Labour' government of 1997 committed to addressing problems arising from the increasing longevity of the population. Following the establishment of the Social Exclusion Unit in 1997, a project called the Inter-

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[6] For the UK, the term 'LA' (Local Authority) is used with the same meaning 'LEA' (Local Educational Authority) without differentiation in this study. Since the 'Education and Inspection Act' of 2006, the formal term is Local Authority.

Ministerial Group on Older People (IMG) was undertaken to co-ordinate government policy and planning. IMG sought to achieve the following objectives: to ensure active, independent and secure lives for older people; to acknowledge older people's great contribution to society, thereby advancing their welfare through policy making; and to enable everyone regardless of age to have the opportunity to play their role in the development of society. The Department for Education and Employment's contribution within the IMG was to assess all aspects of older people's participation in learning.

A project called Better Government for Older People programme (BGOP) was initiated in 1998 to widen participation in learning for all, and to forge partnerships in the process (Carlton and Solusby, 1999, p. 65). It advocated for better and coordinated service provision at both national and local levels in partnership with all the relevant agencies. The Learning and Skills Act of 2000 required each locality to extend learning provisions for all age groups, particularly fostering learning opportunities relevant to the older age group.

Local Authorities

In the UK, as far as older people's education was concerned, the provision of such services was provided by local authorities from the early 1900s up to the 1990s, which included adult education centres, education colleges, and community centres. The passage of the Further and Higher Education Act of 1992 distinguished vocational curriculum ('Schedule 2') from non-vocational learning and transferred the funding of further and higher education to the Further Education Funding Council (FEFC) and the Higher Education Funding Council (HEFC). Therefore, local education authorities (LEAs) were empowered to offer adult education services outside Schedule 2, which refers to informal adult education that does not necessarily confer vocational qualifications.

The predicament concerning the education of older people that followed from this change was the decline in the provision of general adult education by LEAs, due to lack of funding, and increasing focus on accredited programmes by learning providers, in order to gain financial support from the FEFC. Where courses continued, older adults faced significant fee increases.

Despite the problems in the provision of non-Schedule 2 programmes for older people, the total enrolment rate of those aged over-sixty for non-Schedule 2 increased by 0.5 per cent between 1995/6 and 1997/8, whereas it decreased over three years by almost 12 per cent (see Table 6-2 Total Local Education Authority enrolments for each year in Carlton and Soulsby, 1999, p. 33)[7]. There is a clear implication that older people prefer non-accredited courses such as art, language, music and information technology. This is supported by, for example, Aldridge and Tuckett's study, "What Older People Learn" (2008)[8] which showed that the most popular subjects of study for older people aged over 55 were computer studies, foreign languages, and arts. Apart from computer skills, older learners preferred cultural and artistic topics at the expense of work-related and technical subjects. The only work-related subject to increase in relative popularity with older learners was occupational health and safety (Aldridge and Tuckett, 2008, p. 8).

The Further and Higher Education Sector

Following the 1992 Act that took colleges from the jurisdiction of local authorities (LA) in England, Further Education (FE) colleges continued to provide non-vocational adult education services and many LAs offered learning opportunities by contracting with the FE sector. Mainstream FE funding regimes operated with no incentives to recruit older adults as students, and there were local variations in the absence of an explicit policy. In 1996/7, 11 per cent of all FEFC funded students were over the age of 50, with 3 per cent over the age of sixty (Carlton and Soulsby, 1999, p. 40). According to the Dearing Report (1997)[9], the number of HE students over fifty was 0.28 per cent of that age group, compared to 22.74 per cent of the age group 18 to 20 (Carlton and Soulsby, 1999, p. 46). By contrast, 17 per cent of students enrolled in the Open University were aged fifty and over in

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[7] Benyon (2010) noted that according to the UK annual National Institute of Adult Continuing Education Survey, older people's participation in learning increased up until 2000 but has since declined.

[8] In Sargeant's study, "Learning Divide" (1997), the most popular subjects of study for older people aged over 55 were computer studies, foreign languages, and leisure subjects.

[9] The Dearing Report is formally known as the Reports of the National Committee of Inquiry into Higher Education and was published in 1997. The report was commissioned by the UK government and was the largest review of higher education in the UK since the Robbins Committee in the early 1960s (http://en.wikipedia.org/wiki/Dearing_Report).

1996 (Carlton and Soulsby, 1999, p. 46). Since extra-mural departments offering non-vocational liberal education have progressively been incorporated into other departments in traditional universities, with a reduction of financial support, it has become unfeasible for older learners to attend HE programmes except for the Open University.

During the academic year of 2002 and 2003, Universities UK figures showed that 7.1 per cent of students in HE were over age 50. 0.5 per cent of all full time students and 16.5 per cent of part time students in higher education were over age 50 (Universities UK, 2010)[10]. Concerning financial support for learning, the Department for Work and Pensions published a report "Older People's strategy in Opportunity Age – meeting the challenges of ageing in the 21st century" (March , 2005), which declared that there would be no age limit attached to higher education fee loans from 2006 onwards. The limit had previously been raised in 1999 to fifty-four from the previous age limit of forty

Voluntary Sectors

Carlton and Soulsby (1999) classified between voluntary agencies mandated to offer education and training services as their main aim, or as a support to other social goals. In this section, three voluntary organizations in the UK are mentioned: WEA (Workers' Educational Association), PRE (Pre-Retirement Education), and U3A (University of the Third Age).

The WEA is a long-established provider of liberal adult education in the UK, which also promotes students' democratic participation both in classes and in the association. It offers daytime, evening, and weekend courses. These classes include programmes especially for older people. Fees vary depending on the locality but special consideration is afforded to financially challenged adults. PRE is provided by employers, and educational bodies such as the WEA, private organizations, and retirement councils. The Pre-Retirement Association (PRA),

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[10] Universities UK (2010) figures showed that among first-year students on full time and part-time courses in the UK during the academic year of 2007 and 2008, 6.8 per cent of students in HE were over age 50. 0.5 per cent of full time students and 15.4 per cent of part time students in higher education were over age 50.

working with the Centre for Health and Retirement Education, works as the umbrella organisation.

There are several self-help organizations that primarily advance adult learning. U3A is one of these, consisting of third agers who are not fully employed and they organize their own educational activities, utilising the skills of members and consulting with local institutions.

5.2.2 KOREA

In Korea, 'educational programmes of older people' have been differentiated in three categories: education for older people; education by older people; and education about older people. Han, J. (1993) introduced the triarchic concept of 'senior education' in the field of educational gerontology in Korea, using Peterson's concept of educational gerontology. Peterson (1976) suggested three domains within the field of educational gerontology: education for older adults; public education about ageing; and the education of professionals and para-professionals in the field of ageing. In Korea, Han, J. (1993) adding to these another domain of education by older people, meaning educational programmes in which older people teach other people, normally the younger generation.

Out of the three domains, the review here focuses on education for older people. Han, J. (2005) examined learning programmes using the categories: senior classes supported by the Ministry of Health and Welfare (MOHW); welfare centres; senior welfare centres; senior universities of KOPA; programmes by colleges or universities; senior classes by religious organisations; and other programmes. Academics in Korea tend to consider programmes for older people as programmes exclusively for older people. I shall review programmes which older people can participate in. Therefore, I will examine learning provisions in the categories of local authorities, the further and higher education sector and voluntary sectors. For the voluntary sectors, I will examine the learning provision in three domains: senior organisations; general voluntary organisations; and religious organisations.

General Policies

In 1999 the ʻLifelong Education Lawʼ (LEL) was implemented in Korea, aiming to develop a learning society following the international trend. In 2007 reflecting on the accomplishments and limitations identified since 1999 under the LEL and changes that had taken place in the policy environment, the government initiated a revision of the Law. LEL clarified the scope and field of lifelong education, defining it as "all types of systemic educational activities other than regular school education," which includes education for diploma achievement, basic adult literacy education, vocational capacity-building education, liberal arts education, culture and arts education, and education in civic participation (MoEST, 2009).

In terms of policy implementation, the 2007 LEL presents an administrative structure that works across central government, metropolitan governments and municipal governments. At the central government level, the National Institute for Lifelong Education (NIFLE) was launched under the Ministry of Education, Science, and Technology (MoEST) in February 2008. Under the Law, the NIFLE was given full responsibility for works related to promoting lifelong education in Korea, administering the Academic Credit Bank System, and operating the Bachelorʼs Degree Examination for Self-Education (MoEST, 2009). The structure of administration and support for national lifelong learning education based on the 2007 revised LEL is shown in Figure 5-1.

	Ministry of Education		**Board of Lifelong Education**
	Facilitating the activation of resources		Evaluate lifelong education promotion plans and improve systems; coordinate government policies and programmes

↓   ↓

National Institute for
Lifelong Education

Support lifelong education promotion activities; conduct surveys and training for the lifelong education' development programme

↓

↓   ↓

Lifelong Education council, districts

Provincial Institute for
Lifelong Education

Offer lifelong education opportunities and information, provide lifelong education counseling programme

Lifelong Education Committee

Coordinate and deliberate on lifelong education programmes; foster linkage with related regional organisations

		Central government	**Metropolitan cities, provinces**	**Cities, counties, districts**
Name of function		Lifelong Education Promotion Committee (under the Ministry of Education, Science, and Technology)	Lifelong Education Councils Lifelong Education Promotion Institutes	Lifelong Education Councils (ordinances issued by local governments) Lifelong Learning Centres
Function	Committee/ Councils	Evaluate lifelong education promotion plans and improve systems; coordinate government policies and programmes	Coordinate and deliberate on lifelong education programmes; foster linkage with related regional organizations	Provide actual lifelong education; coordinate related programmes
	Expert bodies	Support lifelong education promotion activities; conduct surveys and training on lifelong education; develop	Offer lifelong education opportunities and information;	Implement programmes to induce active civil participation in

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		programmes	provide lifelong education counseling programmes	lifelong education
Organisational composition		Chairman of Committee: Minister of Education, Science and Technology -Committee members: maximum 20 lifelong education experts appointed by the Chairman	-President of Council; metropolitan mayors and provincial governors - Vice-President; Vice-Superintendents of metropolitan/provincial offices of education - Council members: maximum 20 lifelong education experts	- President of Council: head of sub-level administrative units - Council members: maximum 12 lifelong education experts

Figure 5-1 Structure of Administration and Support for National Lifelong Education
(MoEST, 2009, p. 41)

In Korea, two governmental departments are in charge of education for older people; MoEST and the Ministry of Health and Welfare (MoHW). MoEST acts under the 'LEL (Lifelong Education Law)' and MoHW acts under 'EWL (Elderly Welfare Law'. Article 36 Clause 2 in the EWL classifies programmes under: elderly community halls (kyungrodang); senior class; senior recreation facilities; senior welfare centres and seniors' leisure facilities. Senior leisure facilities provide leisure programmes for older people, such as educational or learning activities, and programmes which satisfy the need to participate in social activities, to keep healthy, and attain income insurance. In 2009, the number of senior classes supported by MoHW was 1,280 (http://www.mw.go.kr). Senior class operating guide based on EWL (Lee, 2010) in Korea is as follows:

> **A. Registration Standard**: First, facilities should be such as lecture hall (more than 33 square meters), office, resting place, toilet, and other facilities necessary for increasing senior welfare, etc. It should be operated at least once per week. Second, the total number using this space should be more than 50 and it should be opened to old people aged 60 years or more.

B. Registration Procedure : anyone who wants to set up senior classes should fill in the registration form and should submit the documents below to local government authority : location map, plane map, facility list, CV of the representative, evidence document which to show the right of using facilities, and operating regulations or rules.

MoEST considers education for older people as a sub-field of lifelong education but in fact MoEST has not taken appropriate care of education of older people. The department of lifelong education in MoEST mainly deals with private education institutions for school-aged students. In Korea, the local governmental authority is divided into two different organizations: one is for general administration, which includes welfare affairs, and the other is for education itself, and is called the Local Educational Authority. Therefore, the local governmental organization supporting education for older people can be shown as in Figure 5-2.

Local authority

In Korea, from 2000 onwards, the Ministry of Governmental Administration and Home Affairs (MoGAHA), has set up at each village office a community centre, which is called the 'Citizen Self-governed Centre (below citizen centre)'. The introduction of an electronic administration system meant that the village offices needed to change their role. Therefore, MoGAHA planned to replace or expand the vas citizen centres. Citizen centres provide learning programmes, in particular, hobbies that are related to all, including older people. In 2012, the number of citizen centres was 2,699 and the number of programmes related to culture, leisure and lifelong learning was 26,419 out of 37,967 (70 per cent).
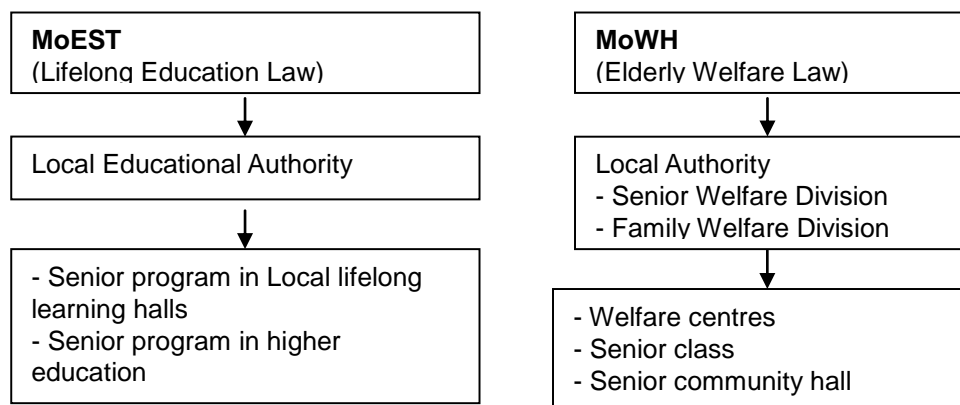
Figure 5-2 Administration Structure for Senior Progrmmes of MoEST and MoWH

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Secondly, the Local Lifelong Learning Halls (LLLH) from 1999 onwards have been run by each local educational authority according to the Lifelong Educuation Law. By law in 1999, MoEST gave the role of central control to KEDI (the Korean Educational Development Insitute). KEDI had a responsibility to designate institutions that apply for being considered as local lifelong learning halls and this responsibility transferred to NIFEL in the amended law in 2007. In 2007, the number of lifelong learning centres (previously LLLH) was 314. The number of lifelong learning centres based on LEL was 358 in 2008, 379 in 2009, 384 in 2010, and 391 in 2011.

Thirdly, there are Senior Welfare Centres and Welfare Centres supported by local authorities under the Welfare Law. Most of these centres are run by non-governmental organisations, usually religious groups or charities. However, the local governments support these organisations. These centres normally run learning courses for the aged. In 2004, there were 152 senior welfare centres and 353 welfare centres. At the time of the fieldwork (in 2006), there were 211 senior welfare centres and 397 welfare centres (KEDI, 2007).

The Further and Higher Education Sector

Unlike in the UK, most universities in Korea are private. In 2009, the total number of universities (offering four-year courses) in Korea was 177, and out of those, 151 (85 per cent) were private and 26 were state-maintained (15 per cent). Therefore, Korean universities tend not to provide learning programmes that are free of charge and open for the general public. However, from the late 1990s, universities (in Korea four-year course) and colleges (in Korea offering only two-year course) set up lifelong education centres and provided learning programmes equivalent to university-level academic subjects, which are liberal education, leisure-based courses, or skill-improvement courses. In 2009, the total number of lifong education centres attached to higher educational institutions was 257 (http://www.index.go.kr/).

However, older people tend not to participate in these programmes because the programmes are relatively expensive. Some centres do provide free courses or charge concessionary fees, while some centres run some courses only for the aged.

Daegu University provides special learning programmes for older people (since 1975). It is linked to the local authority and provides professors to lecture to older people.

Kyungbuk National University runs the free 'Honorary University' for older people. This university has been recruiting 200 to 250 students aged over 50 years annually since 1995. Honorary students can take a three-year course like the usual university students, and they are awarded a graduate certificate when they complete 30 credits. Subjects are limited according to the availability of academic departments and professors. In addition, graduate students can step up to a further level courses called 'advanced courses'. The advanced course is a two year course and separate classes are organised and provided for students who have graduated from honorary student course. This is very similar to the French model of U3A. However generally people who do not have a strong educational background or enough confidence to follow academic courses and hence find it difficult to participate in the Honorary University.

Another representative programme provided by higher education institution is 'Silver Net', which is a programme designed to provide computer literacy for older people through the use of Word, Internet Explorer, Excel, and so on. The headquarters of the Silver Net Campaign entrusts learning programmes to the universities in which there are sufficient facilities for education in computer rooms. In 2008, 5,063 older people participated in the 2 week course in 80 universities. 60.5 per cent men and 39.5 per cent women participated in the programme. The participants aged 55 to 60 were 53 percent; aged 61 to 70, 38.8 per cent; and aged more than 71, 8.1 per cent.

Voluntary Sector

Learning provision in the voluntary sector can be organised under three sub-domains: senior organisations; general voluntary organisations; and religious organisations. First, there are senior schools run by senior groups like the Korean Older People Association (KOPA), which accounts for the major share of senior education. The current status of KOPA will be examined in Chapter Six. In 2006, the number of senior leader universities was 20 and there were 321 senior schools.

Secondly, there are also general voluntary organisations, providing programmes for older people: YMCA, YWCA, Red Cross, etc. Generally, these institutions do not run long-term programmes for older people, but short-term ones to entertain them. For example, the schools founded in 1983 by the Red Cross Service Association for Senior Citizens are directed to help aged persons; to advance health; guide people to help each other and feel the joys of sharing through re-cultivating the virtues of generosity and modesty rooted in human respect; help them develop perspectives which involve understanding the tasks and the changes of current time; and overcoming prejudice and preconceptions to help them realize that senior citizens have enriching histories and traditions and wisdom for the subsequent generations.

Thirdly, recently churches and temples have started to establish senior schools and their involvement has contributed to the rapid expansion of the system. In Korea, though there are no detailed statistics about senior classes run by religious institutions, although education programmes for older people run by religious institutions are very common. Religious-based senior schools have the objectives of enhancing respect for aged persons as well as the propagation of religious values. Most religious schools are Christian, including Catholic. There are Buddhist schools as well. The Presbyterian denomination runs the Association of Senior Education, and in 2005, 566 churches were members of this association. The Methodist church runs 78 senior schools. The Catholic Church organisation takes care of 147 educational institutions for older people (circa 2005). 19 Buddist senior schools are run nationwide (data from Kim, O., 2008).

5.3 THE EXCLUSION OF OLDER PEOPLE IN LEARNING POLICIES AND DISCUSSION OF LIFELONG LEARNING AND ITS PURPOSES

First, current policies in both countries are focussed on vocational goals, based on a view of education as a means to occupational advancement. In the case of Korea, the factors underlying current policies are related to expanding schooling for young people rather than the inclusion of older people. Third, even non-vocational education is viewed in instrumental terms in ways that focus on its contribution to economic aims.

5.3.1 Policy Exclusion in the UK

In 1998, the British government expressed its support for different forms of learning for various age groups through a proclamation of "The Learning Age". Secretary of State, David Blunkett argued:

> *Learning has a wider contribution. It helps make ours a civilised society, develops the spiritual side of our lives and promotes active citizenship. Learning enables people to play a full part in their community. It strengthens the family, the neighbourhood and consequently the nation. It helps us fulfil our potential and open doors to a love of music, art and literature. That is the way we value learning for its own sake as well as the equality of opportunity it brings. To realise our ambition, we must all develop and sustain a regard for learning at whatever age*
> *(DfEE, 1998a, Foreword).*

This Green Paper expressed its concern for the welfare of older people, saying: "Learning increases our earning power, helps older people to stay healthy and active, strengthens families and the wider community and encourages independence" (DfEE, 1998a, p. 10), although the policy did not seem to fully acknowledge the emerging group of third agers. The message of the Green Paper mentioning older people brought about new expectations of government action. There was some expectation that the government would set up a learning system to consider the interests of older people, because since 1992 the support for the non-vocational (noncredit) learning programmes most preferred by older people had been in severe decline, due to the Further and Higher Education Act (Phillipson, 2000).

The learning policy of the New Labour government was consistent with the previous Conservative policy to the extent that both policies were based on a 'human capital' model, which emphasised that investing in people through education and training as well as in physical capital could lead to improved productivity. The Green Paper evidently promoted the economic value of education. It was argued that the most productive investment is associated with the best educated and best trained workforces, and that the most effective way of getting a job is to posses the skills needed by employers (DfEE, 1998a, p. 10).

Thus, the eventual expectation was that this national policy stance would lead to a narrow definition of lifelong learning, confined to work, qualifications, and economic value. Apparently, the third age group – since they are not primary contributors to economic activity – was being excluded (Walton, 2000; Benyon, 2010). Both the New Labour Government 1997-2010 and the Coalition government elected in 2010 have continued to frame lifelong learning policy for 'older people', rather than the third age group. Moreover, there has been a significant gap between the ideal scenario of policy and the actual picture, as Schuller and Watson's "Inquiry into the Future of Lifelong Learning" (2009) and Withnall's (2010) research have observed.

The human capital model has emerged most strongly from among the various paradigms of a learning society as it is understood as significantly relevant to the knowledge economy. On this note, Young (1998) affirmed that the reason why the notion of a learning society started being used in the non-education area is that it functions as an ideology supporting socioeconomic change:

> *… there are material reasons why the utopian visions of Hutchins and others have become appropriated both by progressive educationists and by business and management theorists nearly 20 years after they were first published. The idea of a learning society, as well as the associated ideas of an information society and a skills revolution, reflect real economic change and at least a partial recognition that the mode of production and the conditions for the profitability of European companies have changed (Young, 1998, p. 193).*

As explained by Schuetze and Casey (2006, p. 282-283), the human capital model characterizes lifelong learning as never-ending, work-related training and skills development to sustain the economy and provide employers with a qualified, flexible, and adaptable workforce ('Lifelong learning for employment').

Four different basic models of lifelong learning, work, and society can be determined (Schuetze and Casey, 2006), of which the human capital model is the first. The second is an emancipatory or social justice model that emphasizes equal chances for education in a democratic society ('Lifelong Learning for All'). The third is a cultural model, focused on individual achievement or self-realisation

('Lifelong Learning for self-fulfilment'). The fourth is an open society model, which looks at lifelong learning as an adequate learning system for developed, multicultural and democratic countries ('Lifelong learning for all who want, and are able, to participate').

Promoting learning is necessarily highly connected to employment goals, in industrial countries. The nature of jobs is rapidly changing which urges workers to constantly acquire new and highly relevant skills. The impact of globalisation sends a clear message to governments that they can no longer rely solely on the school system to hone the skills needed by the economy. Expanding school participation or enhancing the quality of school education will not suffice to meet the demands of the labour market (Atchoarena, 2003; Jerald, 2009).

Academics have proposed various models of the idea of the learning society as it has been embraced by governments since the mid-1970s (Coffield, 1997), some of which contradict each other. For instance, Ranson (1994) argued that a learning society is where new moral and political democratic order takes shape instead of just training people to be competitive (Ranson, 1994). For Christoper Ball (1999), a government should advance a learning society on the basis of individual responsibility, personal learning investments, and market promotion. In the UK, New Labour embraced the latter view as lifelong learning became integrated into post-16 education and training policies.

Post-industrial countries like the USA and UK have prioritised work ethics and competition in the labour market as matters of policy in the 1990s, since policymakers knew that local and national economies were greatly influenced by the needs of global capitalist businesses, and education plays a vital role in the grand scheme of economic development. As such, individuals and institutions were pressured to 'learn to compete' (DfEE, 1996) as never before. Governments rediscovered human capital theory, which highlighted the importance of people's skills and capabilities in boosting productivity and the significance of investment in education. In the 1990s, the UK government firmly believed that it was by further investing in human capital that a country could become globally competitive. As the DfEE (1996) pamphlet puts it, 'investment in learning in the 21st century is the equivalent of investment in the machinery and technical

innovation that was essential for the first industrial revolution. Then, it was capital; now, it is human capital' (Tomlinson, 2001, p. 4). This trend continued to influence the New Labour government's stance towards learning throughout its three terms that ended in 2010, and this was the policy stance at the time the data collection for this research was initiated .

> *Learning is the key to prosperity - for each of us as individuals, as well as for the nation as a whole. Investment in human capital will be the foundation of success in the knowledge-based global economy of the twenty-first century. This is why the Government has put learning at the heart of its ambition (Learning Age: a renaissance for a new Britain, Foreword, DfEE Feb 1998).*

Government have invested a lot of effort to urge people to be engaged in continuous learning activities. In a White Paper published in 1995 with the title, "Teaching and Learning: Towards the Learning Society", the European Commission stressed three 'factors of upheaval'. These destabilizing factors include the impact of information society, the impact of industrialisation, and the impact of the scientific and technical world. Learning is highly associated with abundance and prosperity in many European policy papers. British Prime Minister Tony Blair declared in 1998: "Education is the best economic policy we have".

There are three crucial points that allow us to understand the concept of learning society as defined by the ESRC (1994, p. 2). First, every citizen is a participant. Second, the learning contents can be both general and vocational education. Third, the goal is to ensure social integration and economic success by developing people's knowledge and skills. This has significant implications.

Taking into account the development of lifelong learning practices and policies, Colin Griffin (1999) asserts that the process can be interpreted as the state trying to transfer the responsibilities of offering individual learning programmes from the state to the individual, as opposed to having a centralised learning system. He considered this to be a neo-liberal welfare reform approach, which is related to the welfare crisis in Britain and elsewhere.

In the UK, Helen Bowman and Tom Burden (2002) studied the experiences and

opinion of older people about community education by conducting in-depth interviews in a large northern city. They asked the respondents to react to statements from policy papers describing the government's view on adult education. The study revealed that policies did not match the perceptions of respondents. Vocational relevance, lifelong learning, and individual responsibility are not aligned with the responses. Withnall (2010) showed the similar findings on the basis of research carried out from 1999 to 2004. She explored older people's experiences of education and of learning over the course of their lives, the factors that might affect whether they choose to learn in retirement and what role learning might play in their lives as they grow older. She used a range of different investigative methods including participation by a small group of older people themselves as interviewers of their peers. She reports that in 1999, when her study started, older people actually received very little attention and were more or less excluded from consideration regarding educational opportunities (p. 93).

> *In spite of some recognition of the supposed value of learning in*
> *later life and some good intentions, older people still barely*
> *feature in educational thinking, and indeed non- vocational adult*
> *education has largely taken a back seat in the current drive to*
> *improve the skills of the workforce (Withnall, 2010, p. 107).*

Although the government responded to criticisms of the diversion of the adult education budget to employment-related training in a report 'The Learning Revolution' published in 2009 (DIUS), employment-related priorities have continued since 2010 under the Coalition government. However, the 'Learning Revolution (DIUS, 2009)' did emphasise the need to support people to drive their own wider learning in adult life, through self-organised groups, giving explicit recognition to the U3A as a model of this approach.

5.3.2 KOREA

The introduction of the Lifelong Education Law in Korea in 1999 was important, for the following three reasons. First, it had implications for reshaping the traditional foundations of the school-orientated education system. Second, its idea and ideology attempted to cross the boundaries between educational realms in the whole learning ecosystem (Han, S., 2001). Third, every citizen was to be entitled

to learning opportunities from the cradle to the grave. Thus, the implementation of LEL can be seen as the historic change in the educational field.

However, from the standpoint of older people in society, it has been evident that the LEL is not enough. In this respect, three key issues can be identified. First, there was no direct mention of learning for older people both in the 1999 law and the 2007 revised law. Yet, it should be assumed that the definition of lifelong education from the cradle to the grave does include older people. In Korea, local governmental authority is divided into two different organisations: one is for general administration, which includes welfare affairs, and the other is for education itself, and is called the local educational authority. Culturally, in Korea, education is separated from other matters, because it is not only a separate professional sector but it is also controlled by other rationales than those of politics, economics, etc. But education of older people is considered as a sector of the welfare service, rather than the sector of education. Therefore, older adults are not the focus of lifelong learning policies put forth by the Ministry of Education, Science, and Technology (MoEST)[11].

Second, this law seems academically orientated, reflecting the deep-rooted 'diploma-disease' of Korea; obtaining academic qualifications is less relevant to older people. The LEL functions for the provision of compensatory higher education institutions as a result of making it possible for 'distance learning universities' and 'corporate universities' to award degrees. It is strongly related to the 'Credit Bank System' (CBS), in which it is possible to convert and accumulate most experiences of learning, vocational qualifications, and accredited classroom experiences into academic credits for a higher education degree. Under this system, learning experience is abstracted into academically exchangeable units of value. When a student accumulates the credits, CBS approves credits, and then a student obtains a bachelor's degree or associate bachelor's degree. In other words, CBS provides opportunities for higher education. The numbers of students who obtained degrees in this way were 2,510 in 2001; 4,601 in 2001; 8,249 in 2003;

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[11] In the 1999 version of LEL there were no remarks on older people or senior education. According to clause 10 of LEL, it was recommended that a local educational authority should have a 'Lifelong Education Consultative Meeting' led by the superintendent of education. Education for older people was also excluded from this meeting (Lee, B., 1999).

9,524 in 2005; 19,093 in 2006; 28,009 in 2007; 35,156 in 2008; and 48,116 in 2009 (MoEST statistics, http://www.index.go.kr/).

Third, it can be said that this law creates a culture in which education can spread and flourish to create expanding learning opportunities, but without considering issues of equality. It results in inequalities in the distribution of learning resources, whereby older people tend to be excluded. It is argued that the state seems to make use of personal knowledge, skills and learning for economic reasons, disguising this use as support for individuals' learning. In addition to that, the system is likely to maximise social inequality in power and wealth because normally this kind of tendency requires competition of individuals in learning:

> *As an ideology it provides a justification for inequalities by masking the extent to which modern societies, as well as depending on the populations' knowledge and skills, are also based on growing inequalities of power and wealth (Young, 1998, p. 193).*

In the report "Adult learning in Korea: Review and Agenda for the Future" published in 2003 by the Korean Educational Development Institution (KEDI), learning for older people is categorised into 'Adult Learning and Groups with Special Needs' (Chapter Eight). In this expression, learning groups with special needs are 'the aged' and 'prisoners'. This categorization is understood in terms of giving special attention to minority groups and is based on concerns for welfare. However, the reason why attention should be paid to learning of older people in this way is because the discussion of the learning society is being driven by a certain pressure or power. Expanding learning opportunities for older people is not because the group of older people has been marginalised and special treatment for them should be offered, but rather because society requires a new paradigm of learning and in this context, learning for older people should be redesigned.

In the proceeding section, I would like to tackle the reason behind the emergence of a human capital model of learning in the ageing society against the backdrop of a knowledge-based society.

5.4 REASONS FOR THE EXCLUSION OF OLDER PEOPLE IN LEARNING POLICIES: ECONOMIC VALUE IN THE KNOWLEDGE-BASED SOCIETY

This section will examine why older people have tended to be marginalised from learning policies. Non-vocational adult learning has been relatively ignored in the general drive to improve national workforce skills (Withnall, 2010, p. 107). Learning institutions for older people like U3A or SU have emerged, to fill the gap which older people have experienced. It is a consistent problem, even while governments advocate the learning society and the ageing society, that governmental policies have not completely considered older people; thus, it is worth to investigate the underlying reasons.

I argued in the previous section that learning policies in the UK and Korea are based on a human capital model. I argue that the concept of the learning society has been advocated all over the world as a means to adapt to social changes, the essence of which is knowledge and information. Today's knowledge and information economy necessitates people to immerse themselves in a learning environment that goes beyond the compulsory education system, in search for more knowledge. This economic justification led to discourses on a learning society that have not considered older people, though as an ideal concept it encompasses the whole range of ages.

The exclusion of older people can be attributed to the nature of the knowledge-based economy, specifically the support for a human capital model. According to Reich (1991), education is not detached from the economy, thereby leading to the idea of a learning-led economy. Providing high quality education and prioritising learning as a condition for economic success are highlighted. The birth of the learning society may be associated with the surge of ideas like the post-industrial society and the information society (Toffler, 1976) because the process gained momentum not only within academe but also in businesses and governments.

Alvin Toffler's "Future Shock" (1976) which advised people to prepare for future changes, was followed by "The Third Wave" in 1980. Furthermore, in his book called "Power Shift" published in 1990, he argued that power would be shifted

from military and economic power to knowledge power. Daniel Bell, in the "Coming of Post-Industrial Society", noted that the global society would transition from an industrial to a post-industrial stage, characterised by broadened technical and scientific rationality in socioeconomic and political spheres. If industrialists were dominant in the past, technocrats, planners and scientists would take over their place. Bell further noted that the state becomes even more vital in economic management, thereby reducing the role of market forces. Instead of relying on free market forces, the post-industrial society age works toward directing and engineering the functions of society.

Global competitiveness is largely determined by the capability to create, access, and utilise knowledge. Carl Dahlman of the World Bank (2001) expressed this change as 'knowledge revolution' and defined the knowledge economy as "an economy that creates, acquires, adapts, and uses knowledge effectively for its economic and social development." Thus, constant change and competition requires constant restructuring and upgrading.

Peter Drucker (1994) described the changing history of human beings, arguing that humans passed the first phase of the industrial revolution, and reached the stage of product revolution between 1880 to the Second World War, followed by the management revolution. In the period of post-capital society, knowledge serves as the most important factor of production instead of labour or capital. A knowledge economy focuses on the production and management of knowledge. It is more frequently called a knowledge-based economy, a phrase that refers to the use of knowledge for economic benefits.

The term, knowledge economy has several definitions. According to Leadbeater (1999), it does not just refer to high tech industries as it also describes a set of new sources of competitive advantage applicable to all sectors, firms, and regions. Leadbeater (1999) notes that economic success increasingly depends on the effective use of intangible assets such as knowledge, skills and innovations, which are the key resources for competitive advantage. The term 'knowledge economy' is coined to refer to this new economic configuration.

Innovations in technology have significantly transformed economics. Castells

(1989) emphasised computerisation and telecommunication as major technological advances in the 1970s, followed by numerous upgrades, especially the rise of the Internet in the 1990s. As such, new technologies are frequently used in different aspects of work and life, making their economic impacts more evident (Castells, 1989).

Computerisation is a vital factor that has facilitated significant changes in the workplace and in production process (Mathews, 1989). Computers enable users to incorporate functions such as processing, memory, and programming into a single machine, which can perform and change its functions in the workplace based on the changing demands of the production process, requiring little effort on manual resetting.

Innovation in telecommunication is another valuable breakthrough in information technology. Satellites, fibre optics, email and the Internet have changed the way we communicate with each other, especially in terms of cost and speed (Green, Wolf and Leney, 1999, p. 4). One of the main impacts of innovation in communication technologies is to make the exchange of information around the world far easier and faster than before. Documents and texts can now be shared at very minimal cost.

Thus, most clerical work has been simplified. Moreover, capital can also be transmitted in seconds between different economies. Such financial flows have linked capital markets globally and therefore have become a key element of the global economy (Castells, 2000. p, 52, 101).

The continuous technological innovation has changed the structure of occupations and the processes of production. For instance, the number of jobs in traditional manufacturing has consistently declined while managerial, professional and technical jobs have rapidly increased (Castells, 2000, p. 244). Thus, there was a shift of control from machine operators to skilled technicians and those who can process information. Furthermore, new technologies have enabled firms to undertake flexible and small-batch production, shifting the focus from the manufacturer's interest to achieve economies of scale to retail's concern with economies of scope. Also, new technologies have led to the increase in the

complexity of interaction and the use of creativity in the process. Castells even noted that information technologies have become a 'material foundation' for a more flexible, interconnected and networked society (Castells, 2000, p. 70).

The industrial changes affect learning in two ways. On the one hand, individuals are required to learn more complex technical skills that are rapidly changing, often in unpredictable ways. On the other, the general skills of negotiating, gathering, and managing information have become critical. Moreover, the conventional training in academic institutions are even deemed more valuable as shown by the emergence of graduate employment, not for technical expertise, but for the generic analytical and personal skills acquired through higher education (McNair, 2001, p. 21).

One concrete manifestation of a learning society is when most people continue to be engaged in organized activities for longer terms, based on need rather than chronological age (Field, 1998). Field (1998) calls this phenomenon a 'silent explosion', which was once unheard of before but is widely evident today. (cf. Giddens, 1998).

The traditional view of education, as the means by which one generation passes on to the next generations the knowledge it deems worthwhile and valuable, is becoming less dominant. Now, formal education is not the single means for the inter-generational transfer of knowledge; thus, its status is declining. Moreover, the fine line separating education and training has disappeared as workers demand more practical knowledge at different levels, even including postgraduate-level programmes (Jarvis, 2001, p. 37).

It is clichéd to argue that education should not stop after schooling. The purpose of academic institutions is to facilitate continuous education by sustaining the momentum for learning. The interest to learn from life itself, to thrive in a condition where everyone learns in the process of living, has been argued to be the finest product of schooling. Continuing education (Duke, 1999) has gained popularity and is recognised under a variety of names in different countries: permanent education, lifelong education, and recurrent education. UNESCO initially used the term 'lifelong education' which later was known as 'recurrent

education'. That term was used by the OECD until the 1980s, after which it became unpopular (Belanger & Tuijnman, 1997).

The OECD highlighted recurrent education as a strategy for advancing lifelong education. Recurrent education was defined as "a comprehensive educational strategy for all post-compulsory or post-basic education, the essential characteristic of which is the distribution of education over the total life-span of the individual in a recurring way, i.e. in alternation with other activities, principally with work, but also with leisure and retirement" (OECD, 1973, p. 16). It aims to modify the education system by improving access throughout one's lifetime. The strategy envisages a complementary relationship between formal school learning and practical learning. Thus, academic certificates should not be perceived as the 'end result' of an educational career but rather as steps in a continuing process of lifelong education (Tuijnman, 1990). The strategy also fosters policy co-ordination across sectors, especially between education and the labour market, and extended provision of planned adult education in higher education and universities (Tuijnman, 1990). .

The UNESCO Global Report on Adult Learning and Education (2010) also stresses the importance of knowledge production   of knowledge society, in which growth in personal, national, and regional incomes in increasingly defined by the ability to create, manage, disseminate and innovate in knowledge production (p. 12).

We can now consider how the changes of the knowledge society are impacting on older people. Firstly, the aged are as much in need as any other part of society for access to educational opportunities in order to develop as participants in a changing society – for example, being able to use the internet, world wide web, email, and so on; otherwise they will become excluded from the digital society (OECD, 2003). However, in recent decades educational policy has become strongly tied to the requirements of economic productivity, and associated school and vocational education. This inevitably tends to exclude the elderly from policy thinking as their needs are not primarily driven through productivity – although they are partially involved in the case of the significant numbers of working and semi-retired elderly who are still economically active.

5.5 SUMMARY

In this chapter, I have examined how older people are addressed in learning policies, although the learning of older people has been a focus for understanding the ageing phenomenon, and the recent discussions of lifelong learning.

First, I reviewed the general learning policies and learning provisions for older people in each country. In the UK, traditionally the local authorities have been the main providers of learning for older people, through adult education centres and further educational colleges. However, since the1990s, the educational colleges have concentrated on (better-funded) vocational-related courses, instead of liberal education courses. Voluntary organizations such as WEA, PRE, and U3A have expanded to promote learning for older people and to fill in some of the gaps in provision of liberal education that older people are looking for.

In Korea, two governmental departments are in charge of senior education: MoEST under the Lifelong Education Law and MoHW under the Elderly Welfare Law. At a local level, learning programmes are also provided through citizen centres belonging to each local village office. Korean universities generally run lifelong learning centres and provide university-level programmes but they are expensive. The religious bodies such as Catholic Church, and the Buddhists, are one of the main providers of education for older people among voluntary organizations. Senior citizens' organizations such as KOPA also play a major role, in ways comparable to U3A, etc, in the UK.

Secondly, I have examined the status of the exclusion of older people from learning policies and provisions in the two countries. Even though policy interest has been placed on older people's learning, policy initiatives linked to the idea of a learning society have tended to focus on younger age groups – young adults, and the unemployed needing vocational training. Three characteristics were observed. First, current policies are mainly vocational; this is heavily emphasised in the UK. As far as vocational relevance is concerned, it is true to say those policies that were current at the time of the fieldwork, and still today, view education primarily as a means to occupational advancement. Even though the Learning Revolution (2009) report and associated policies emphasised the benefits of wider adult learning,

self-help models and community development, the Report also confirmed that practical training to get people back to work remained a policy priority (p.10-11), an emphasis that has continued under the newly elected Coalition government since 2010. The learning policies in the UK are based on the human-capital model of the learning society. The second ccharacteristic which is most relevant in the case of Korea is the factor that current policies are related to expanding schooling for young people rather than including older people. In Korea, the lifelong learning policies are strongly linked to gaining university level degrees in various ways such as Credit Bank System, Corporate Universities, and distance educational institutions. Third, even non-vocational education is also depicted in instrumental terms which focus on its contribution to broader social aims.

Finally, I argued that the reason why older people are not considered much in learning policies is related to the knowledge-based economy. A knowledge and information economy requires an individual to be involved in a learning system beyond compulsory education for the search for knowledge. This rationale results in discourse about the learning society that does not address older people, though its ideology expands to include the whole range of ages from cradle to grave.

Even though politicians seem to be indifferent in dealing with the general education of older people, various learning programmes for older people have been initiated in many countries in the non-statutory sector, focusing on non-credit learning and the academic development of older people. One of the non-credit learning institutions for older people in the UK is the University of the Third Age (U3A), which has sought to provide general education services for older people since 1981. Its counterpart in Korea is the Senior University (SU), which was created by the Korean Older People's Association (KOPA) in 1981. Therefore, it is important to examine the characteristics of the U3A and SU in terms of learning, teaching and students' experiences and opinions. In the next chapter, I will look at the development, management, and approach to learning and teaching, and participants' experiences of participating in U3A and SU in the UK and Korea.

CHAPTER SIX: OLDER PEOPLE'S ATTEMPTS TO DEVELOP THEIR OWN LEARNING INSTITUTIONS IN THE TWO COUNTRIES

6.1 INTRODUCTION

This chapter will describe the history and development of the institutions University of the Third Age (U3A) in the UK, and Senior Universities (SU) in Korea. It also intends to explain the cultural meanings of similarities and differences that can be observed for the two institutions. The current status of each institution will be given briefly, followed by analysing the history of each institution. One key difference I will argue is that U3A in the UK was established due to the influence of both the self-help movement in the period of economic liberalism, and as a collective response by older people to the focus on learning in later life. On the other hand, the creation of SU in Korea was mainly politically driven as KOPA tried to cater to the rights of older people and to create a political atmosphere, during a time when a non-democratic military government was controlling public education and learning institutions.

6.2 ASSESSING THE CURRENT STATE OF THE U3A AND SU

6.2.1 U3A in the UK

U3A is a self-help organization, first established in 1981, that offers learning opportunities for older people in the UK. Its roots can be traced back to France in 1973, where a strong relationship existed between traditional universities and retired people. Although, it diversified from an original emphasis on study of the humanities and the arts, the 'French model' still retains its close ties with universities. The 'British model' based on a more self-help ethos, does not depend on universities for its identity (Findsen, 2005; Percy and Frank, 2011).

The U3A in the UK follows a constitution first set out by Peter Laslett in 1981 (see Appendix 1), where rules are kept to a minimum. As a matter of approach,

U3A has only members and does not differentiate teachers from students (Laslett, 1996). The teachers are those members who have knowledge they wish to impart to others; members pay a tuition fee which is very low to encourage the maximum involvement of older people. Furthermore, learning sessions are conducted in a member's house or a local community hall. There are no specified entry qualifications, even though U3A uses the title 'university'. The word university is used in its original sense, to refer to a group of individuals committed to a particular activity, which is not necessarily intellectual (Laslett, 1996).

Every year, a general meeting and conference national is organised, where the main office-bearers and committee members are elected and major issues are tackled. In addition, summer school programmes offering a variety of subjects are held annually. The schools, staffed by volunteer tutors, are open to all members. U3A makes good use of the Internet. Aside from the central U3A website (www.U3A.org.uk), many local U3As have also set up their own sites to share information about their activities. In 2011, there were 826 U3A groups and 273,141 members (source: http://www.U3A.org.uk). Furthermore, there were 33 regional or area networks and 40 subject networks. Midwinter (2005) calculated that 14,000 interest groups were in operation every week.

The National Office of the Third Age Trust is located in Bromley, near London. As shown in Figure 6.1, the Board of Trustees is normally referred to as the National Executive Committee (NEC). The NEC manages the Trust and its activities through the national administrator (U3A NEWS, 2006).

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┌─────────────────────────────────────────┐
│   National Executive Committee (NEC)     │          ┌──────────────────────────┐
│                                          │          │  National Office (Bromley) │
│        The Board of Trustees             │          │                            │
│         Honorary Officers:               │          │ Company Secretary/ National│
│ Chairman, 2 Vice Chairman, Treasurer,    │──────────│       administrator        │
│       Secretary, elected annually.       │          │      3 f/t 5 p/f staff     │
│ 13 representatives from Areas, elected    │          └──────────────────────────┘
│   for a period of three years.           │
└─────────────────────────────────────────┘
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| Development Sub-committee | Publicity and Public Relations | Standing Committee for Education | Finance and Fundraising Sub-committee | U3A NEWS Editorial Board |

ICT Advisory Group   U3A NEWS Business Group

| Development Officer | Learning Support Group | Travel Group | Resource Centre |

| Regional Contacts | Learning Support Network | Online Courses | Sources Editorial Board | Subject Networks |

Figure 6-1 The Third Age Trust − Relationship Chart in 2006

(at time of fieldwork)

6.2.2 SU in Korea

The terms, 'senior university', 'senior school' and 'senior class' nowadays imply the same meaning. While KOPA has insisted on differentiating the meaning of the three terms (learning classes conducted in the headquarters and regional/provincial association buildings used to be called 'senior university', those in borough level centres were called 'senior schools' and the ones in school districts were considered 'senior classes'), the senior schools are nowadays called senior universities, and the Elderly Welfare Law classifies all these groups as 'senior classes'.

KOPA, a private enterprise created through the Civil Law article No. 32, is a national centre that organizes various activities for senior citizens. It has three founding objectives: to increase seniors' status in society; to uphold seniors' welfare; and promote social relationships among senior people (Choi, D., 2002). KOPA fulfils these objectives by carrying out the following activities: creating a job centre and promoting the enhancement of senior job-related competency; the provision of senior leisure facilities; education for meaningful ageing life; research and policy development for senior welfare; the preservation of traditional culture and guidance of adolescents by teaching filial piety; and other activities related to advancing senior people's interests (Kim, D., 2004, p. 30).

KOPA is headquartered in Seoul, with 16 associations in various cities and provinces. There are also 245 borough-level centres and 60,397 senior community halls ('Kyungrodang'), which are situated in villages and urban apartment complexes. In addition, there are 3,823 senior classes (senior groups) in every elementary school district. There are 13 senior leader universities in regional/provincial associations and 321 senior universities in borough-level centres (see Table 6-1). Some of the borough-level centres have general welfare centres and senior welfare centres, and some programmes have been named senior universities in those centres. Figure 6-2 shows the organisational map and the position of SU within KOPA.

Table 6-1 the Number of Senior Universities and Schools by Locality in 2011

Locality	Senior Leader University	Senior University	Locality	Senior Leader University	Senior University
Seoul	1	28	Chungbuk	1	12
Pusan	1	16	Chungnam	1	22
Daegoo	2	10	Chunbuk	1	14
Incheon	1	9	Chunnam	1	20
Gwangjoo	1	4	Kyungbuk	1	56
Daejeon	1	7	Kyungnam	1	29
Woolsan	2	5	Chejoo	1	9
Kyunggi	2	58			
Kangwon	1	22	**Total**	**20**	**321**
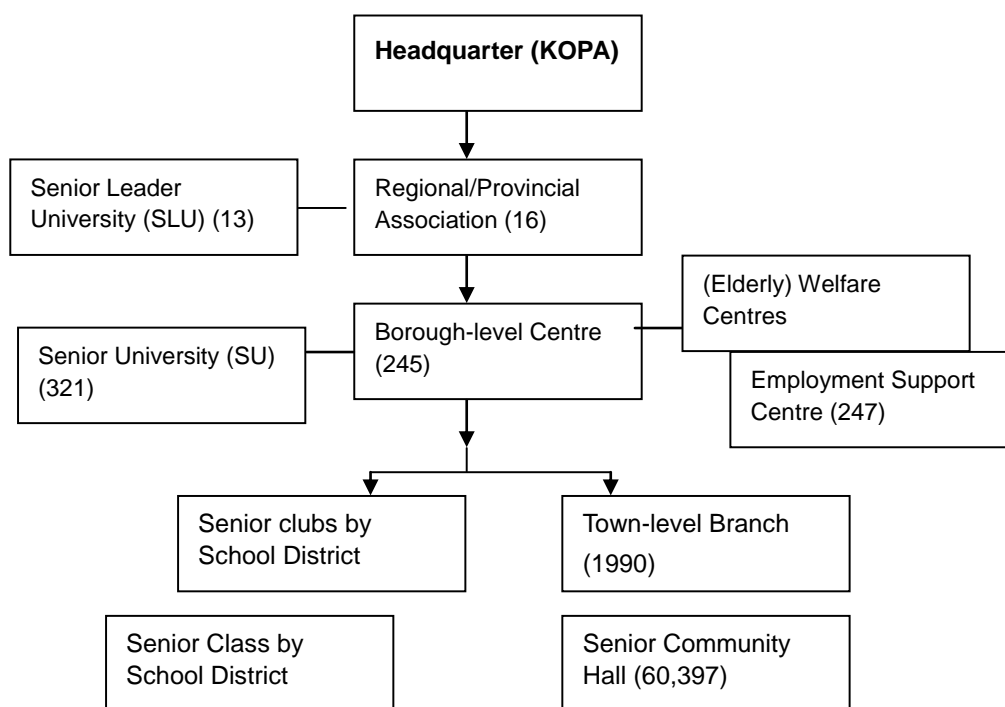
Figure 6-2 Organisational Chart of KOPA and SU in 2011

(Numbers in brackets are the total number of each type of centre)

In each regional centre, the president of local centre takes responsibility while the dean is tasked to control the administration of the curriculum, the contents of which are lectures related to aspects of senior life, health, music or dance. Normally, senior classes are staffed by volunteers and the borough-level staff for KOPA centres usually works for senior universities.

6.3 HISTORICAL DEVELOPMENT OF U3A AND SU

6.3.1 U3A in the UK

The first University of the Third Age emerged by virtue of the 1968 French Law on the Direction of Higher Education, which urged universities to help institutionalise lifelong learning. At that time, France had no counterpart of the British 'night school' tradition, but the Universite de Troisieme Age was able to suddenly change the scenario (Formosa, 2010).

The UTA phenomenon was the brainchild of Pierre Vellas when he raised the idea of the UTA to the Administrative Council of the Teaching and Research Unit in Toulouse, composed of representatives of French university professors, students, and administrative personnel, as well as international agencies (World Health Organisation, International Labour Organisation, and UNESCO) (Formosa, 2010; Vellas, 1997).

Concerns for the education of older adults emerged in the UK in the mid-1970s. Glendenning (1983) cites a significant paper published in 1975, 'Education and Elderly' by Jones in the Technical Journal, which was reprinted by the Beth Johnson Foundation and the Department of Adult Education, University of Keele in 1976 and 1980. Eventually, a formal partnership between the Foundation and the University of Keele was started (Glendenning, 1983).

The Forum for Right of Elderly People to Education (FREE) produced a quarterly bulletin in the UK during the early 1980s, propagating the movement for the rights of elderly people to education. According to Glendenning (1983), the movement surfaced in 1981, a period characterized by high enthusiasm towards providing older adults' access to education that had been articulated in the 1970s. Organisations such as Age Concern Help the Aged, the Centre for Policy on Ageing, the Beth Johnson Foundation, and delegates from several universities, research, and service agencies, as well as many individuals, supported the forum (Midwinter, 1982, pp. 29-40).

The academic institutions involved in this development were the Universities of Glasgow, Keele, Lancaster, London, Nottingham and Surrey, some polytechnics notably North London, Hatfield, and Middlesex, as well as several FE colleges which had identified this area as being critical for expansion (Glendenning, 1983). The survey conducted by Walker in 1976 about educational provision for the Beth Johnson Foundation was discussed in a seminar at Keele in 1977 and it spurred a debate on residential settings for education and the potential contribution of providing statutory and voluntary education (Glendenning, 1983). A movement demonstrating an increasing interest in outreach and self-help educational groups also emerged. There were many success stories of educational self-help experiments; the Friends in Retirement Group in Birmingham was the most

popular (according to Glendenning, 1983), having 3,000 members, 98 groups and 31 different activities.

A seminar of educational experts at the University of Keele was held in 1979, in which an educational manifesto was created that formed the heart of the U3A movement. It stated "…the concept of elderly as both teachers and learners needs to replace the image of elders as intrinsically wise or the more recent image of elders as necessarily dependent or burdensome… Ageing is a lifelong process and so is education… Education for ageing and about older people must be developed through society…" (Formosa, 2009, p. 175)

Cambridge University's Peter Laslett, acknowledged as the founder of the British University of the Third Age produced an 'educational charter for the elderly' in 1981, where he enumerated a range of rights to education that older people should be entitled to. It was argued that older people have the right to educational opportunities to compensate for their lack of opportunities in their early lives, which is deemed important in relation to the impact of gender and class on the division of educational opportunities (Schuller and Bostyn, 1993).

The founders of the British U3A were Peter Laslett, Eric Midwinter and Michael Young. From 1966 to 1983, Peter Laslett[12] specialised in politics and history at Cambridge University. He worked there with Michael Young[13], a sociologist, who had been one of the instigators of the Open University in the 1960s (*The Guardian*, 17 November 2001). He participated in many social and political activities to champion human freedom (Midwinter, 2004). Eric Midwinter is a social historian, educator, and social policy analyst. He is also a famous consumers' rights champion. He assumed important positions in various policy think tanks after working as visiting professor of education at the University of Exeter.

Laslett had found parallel ideas to his own in Michael Young's recommendation in the BBC's *Listener* magazine in the late 1950s while he was trying to uphold equity and expand higher education. Laslett explained his approval of the Open University (OU) in Humphrey Carpenter's "The Envy of the World: Fifty Years of

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[12] He died in 2001, aged 85.
[13] He died in 2002, aged 86.

the BBC Third Programme and Radio 3”: "Michael Young and I became friends. He and I agreed about breaking the monopolies of universities, and broadcasting was clearly the manner of doing so" (*The Guardian*, 17 November 2001).

Dr. Nik Coni, a consultant geriatrician in Cambridge, examined caring for the aged in France, in the 1970s. When he returned to Cambridge, a vote was taken among the fellows at Trinity College to establish U3A in Cambridge, approving the educational manifesto that had been set earlier at Keele. The initiative was launched at a public meeting in the , Guildhall, Cambridge in July 1981, with Eric Midwinter, then Director of the Centre for Policy on Ageing, simultaneously launching a national campaign (Formosa, 2002).

Laslett subsequently organized a meeting of educationalists and scientists in Cambridge in 1981 to tackle the issue of adopting the U3A ideal in Britain. As a result, an experimental Easter school in Cambridge was established (funded by the Nuffield Foundation), where 75 people enrolled in the first classes in March 1982. The subjects were mainly traditional adult learning but with considerable scope for discussion and participation. Finally, the creation of Cambridge U3A became certain and a further decision was made to form a national committee.   The creation of a U3A in London was soon planned. Gradually, U3A groups were built in different regions of the country such that by the end of 1983, eight U3As were legally registered and the U3A movement had gained momentum (Midwinter, 2004).

Beyond Third Age education itself, the founders set out the following more general goals: for the education 'industry' to treat education as a service rather than a system; second, for the growth of agencies in all fields to enhance the significance of life in the Third Age; and for the transformation of the social, cultural, and economic norms of society, grounded in U3A principles (Midwinter, 2007).

6.3.2 SU in Korea

In early twentieth century Korea, old people would usually gather in places called 'jungja' or 'sarangbang'. A jungja is located near the entrance to a village, where

elderly men, not women, have conversation with friends. On the other hand, the most common meeting place was the sarangbang which is like a village assembly hall or noinjung with a common lounge area, that was provided by a rich and powerful person in the village. It was usually administered and maintained by the owner, who had the power to use the sarangbang in various ways. Some sarangbangs were open only in winter, when farmers had more free time. Some locals distinguished sarangbang for middle-class people from 'chodang' for the working class. Drinking, co-operative fishing and hunting, and some hobbies were the usual activities and the owner of a sarangbang would also provide food and lodging for travellers (Kim, D., 2004, p. 16).

However, the extreme post-war (Second World War and Korean War) poverty led to the loss of this kind of culture. With most sarangbangs closed, rural villagers usually established a small hut called 'chodang' where they would spend time in leisure activities. During summer, they would spend time together under a big tree while in cities; old people would gather near 'bokduckbang', setting up a 'noinjung', a temporary hut in a public empty space and use it as a place for leisure (Kim, D., 2004, p. 20).

One reason behind the increase in the number of temporary noinjungs was related to the election system in the National Assembly. During the rule of the Liberal Party, candidates provided elderly people with gifts (cigarettes, rice wine, soap or rubber shoes) because the elders exercised great influence and leadership in households, including voting intentions. Therefore, many candidates promised to set up noinjungs for elderly people. In about 20 years (from the rule of the Liberal Party to the Third Republic, 1951~1963) many noinjungs were set up, both in cities and rural areas (KOPA, 1989, p. 254)[14].

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[14] Jae-Gwan Park said in an interview that there were several noinjungs and sarangbangs in the early 20th century. Leetaewon noinjung was built in 1890, one noinjung in Seogangdong in 1908, and Heemang noinjung in Insadong in 1929. In the Junnam province, Sasung noinjung was established in 1916, Juknong noinjung in 1918, Dancheon noinjng in 1925, and Bongseo noinjung in 1921 (KOPA, 1989). These places serve as areas for leisure and communication for the elderly. Noinjungs increased after the Korean War for political reasons and started to create governing bodies and develop elderly groups, the initial goal of which is to share information with each other.

Elderly groups nationwide attempted to merge into a single group in 1965 but they failed to do so due to financial hurdles and conflicts of interest. On 15 January 1969, Geung-Yang Park, Young-Han Lee and Gong-Pyeung Kim formed the 'Korean Association of Elderly Groups' which too had to be discontinued. The current KOPA, established on 15 April 1969 (Whang, 1999), was built voluntarily without any governmental intervention and registered at the Ministry of Culture and Public Affairs (MoCPA) on 19 April 1970 (KOPA, 1989).

MoCPA demanded that KOPA to submit an annual report in 1975 but KOPA was not prepared yet to do the work due to lack of personnel. MoCPA then asked Jae-Gwan Park, who was head of the Communism Research Centre, to serve as director of KOPA. Despite his young age, he managed to take the leading position. He was able to set up the administration department within KOPA and systemised the process of protecting the welfare of the elderly (Park, 2009). This episode shows that although KOPA was in principle independent from government, the military government exerted a direct influence on all civil organisations – there was a benefit for those organisations which registered with the government as they could expect substantial financial support.

KOPA nowadays seeks to uphold the general social welfare for older people, having expanded from its initial operations in 1969 which were focused more on social campaigning for reform, and as a support organisation for MoCPA. Eventually, KOPA changed its registration status from being under MoCPA to being under the Ministry of Health and Society (MoHS). On 28 June 1978, KOPA became a private corporate body under the control of 'the law of foundation and administration of corporate organisations for the public good'. KOPA restructured according to the division of school districts in 1981 (KOPA, 1989). KOPA local branches set up senior universities nationwide from 1975 onwards, due to the increasing importance of education for older people in the 1970s. In the 1980 annual report, it was stated that there were 312 SUs in KOPA (KOPA, 1989).

> *"When I worked for KOPA in 1975, I ordered each branch to set up senior universities. Before then, there were already senior schools. There was a senior school in Myungdong. University students worked for it and it was open once a week." (Personal correspondence with Jae-Gwan Park,*

KOPA)

According to Park (2009), an alternative educational programme for older people began in ʻSeoul Pyungsang Goyuck Wonʼ (located in Yeosunghoegwan in Sogong-dong). Pastor Tae-Jae Kim managed the programme as he had been impressed by Lengrandʼs remarks at a UNESCO conference in 1965 (International Committee for the Advancement of Adult Education). The class, which was held once a week, was sensational. Eventually, a similar initiative was organized at ʻDuckmyungeusukʼ, and in 1973 Dr. Ha Doo-Chul at Seoul Nursing College, set up ʻIn-Wang Senior Universityʼ in Seodaemoon-gu, Seoul. In January 1974, its name was changed to the Korean Adult Education Association (KAEA) and it established senior schools nationwide through the Ministry of Education (MoE).

Gyu-Dong Lee assumed presidency of KOPA in 1981. He arranged the merger of the two national organisations for older people, KAEA and KSSA (Korean Senior School Association), into KOPA. At that time, KAEA had 120 senior universities. KOPA also took over senior classes from MoE that had started in 1978 with government financing (Park, J., 1999, p. 223).

Education of the elderly started to invite more national attention in Korea from 1977, and so MoE intensified its efforts in providing it. MoE designated and equipped 7,371 elementary (primary) schools to provide elderly education in their community, setting up senior classes for liberal education to promote community involvement, and job-related education. These were called senior schools in each school district (KOPA, 1989).

The intention was that MoEʼs senior classes should cater as much to the young, as to older people. According to the governmental official who organized the senior classes programme, the classes were initially planned to teach filial piety to young people, and secondly to provide new facilities similar to kyungrodang, the traditional leisure places for elderly people (Chosunilbo, 19 August, 1999). As a result, each elementary school had a 'senior classroom' and the room was equipped with Baduk (Korean checkers), Janggi (Korean chess), TV, books and so on. It was envisaged that young students would learn traditional cultures and manners from older people in the senior classes.

There were indeed some activities wherein students gathered with seniors to enable the young to learn how to behave and care for elderly people. MoE encouraged schools to support the health of elderly people with the assistance of the school nurse. KOPA established a Board of Education in 1981 to provide national guidance to senior schools. At that time, the senior school leaders were the only privileged group able to complete a one-year course at the senior universities, which was aimed at teaching management skills for operating senior schools.

6.4 CULTURAL MEANINGS OF THE SIMILARITIES AND DIFFERENCES BETWEEN U3A AND SU

The institutions of SU and U3A have four key similarities: both are non-credit learning institutions; both cater only to older people; both institutions require no academic entry qualifications; and they both operate nationwide. There are several reasons underlying the development of U3As, according to Midwinter (1984), and these reasons are also applicable to the development of SUs in Korea. The reasons are as follows: (1) there are increasingly many independent third-agers to be catered for; (2) there is an extremely low take-up of traditional public education in this age group; (3) there is an urgent sense of promoting mental 'agility' among the individuals of this age range as a preventive measure against premature loss of mental effectiveness; (4) abundant leisure time for many people is likely to put strain on the social fabric; (5) people have been fighting for the moral right to educational opportunities for the older people; (6) there are practical issues such as transport, availability of money, and comparative immobility in this particular age group; (7) there are the psychological issues of formal education being linked with the interests and need of youth, not fitting to the self concept of older people, but taken for granted by highly institutionalised provision.

On the other hand, the two institutions are different from each other in three key ways: U3A is organised only for the purposes of learning, but SU is a sub-division of KOPA that promotes all the rights of older people; U3A seeks to be independent and a self-help organisation but SU is more dependent on the government for support; and with regard to the development of local branches of U3A, it was U3A members themselves who took the initiative to gather and

recruit new members, while agreeing to uphold the philosophy of the U3A movement. In contrast, KOPA made a national decision (in 1979) to expand significantly by merging its existing local branch SUs with SUs created by other organisations, as well as by establishing its own new SUs.

Both institutions started in the absence of governmental policies for learning of older people. They differ, however, with regard to the relationship each of the institutions subsequently had with government, as national policies developed. Since the beginning, the British U3A has been independent of governmental policies, holding itself to a 'self-help model', that is, as a social movement for the learning of older people. The SU, on the other hand, can be considered as a 'politically connected model'. Although being managed by a non-governmental organisation, the word 'politically connected' implies state assistance to ensure the growth of a national welfare system, which included the expansion of learning opportunities for older people in Korea.

I will further argue in this section that the creation of the U3A in the UK was driven by the self-help movement, during a period of economic liberalism and national debate about learning experiences in later life. The rise of SU in Korea can be attributed to KOPA's political interest in upholding the rights of older people, in the face of a non-democratic (military) government which had intentions to manipulate education and learning institutions (Park and Im, 2002, p. 12).

6.4.1 U3A in the UK

U3A initially operated as a social campaign to broaden learning opportunities for older people and to form a new learning model based on the UK's self-help culture. As it expanded, it brought in like-minded people to establish U3A branches, and to join the advocacy for the movement. Thus the guiding principles of self-help have remained central to the U3A movement, up till today.

At the same time as the U3A was establishing itself, there was a decline of the British welfare system through the 1970s, due to decline in the British economy, followed by a dramatic political shift in 1979. According to Rennie and Young

(1984), self-help and mutual aid flourished in the early 1980s while political support for the welfare state started deteriorating in 1979 under the neo-liberal 'Thatcherist' politics of the new Conservative government, which implemented new policies to curtail public expenditure, promoting self-reliance and market competition (Han, Y., 2005, p. 12).

Fieldhouse (1996, p. 391) argues that the state tried to retreat from the interventionist orientation of the welfare state to enable a culture of enterprise and independence through self-help. Adult education was part of this paradigm shift in policy as it was envisaged that education should support people to accommodate to the changes in the welfare state structure, and train people to live independently in a self-help culture.

U3A's roots were associated with mutual-aid versions of 'self-help'. A central principle of U3A is to satisfy educational, cultural and social needs through self and mutual help without assistance from the outside, as the U3A motto says: "Those who teach shall also learn and those who learn shall also teach." Rennie and Young (1984) argue that the U3A movement can be related historically both to communitarianism and individualism, both of which had their roots in the informal education that was part of the missionary work of clergy in the UK (Smith, 1997; Kelly, 1992). The growth of informal education through the 19th and 20th centuries took place independently from the government-led educational movement and created an atmosphere in which mutual aid and self-help or individual learning were encouraged.

The principles underlying U3A are important to understand because of the religious and dominantly middle class origins of informal education in the UK, and how these origins shaped the historical development of adult education. The movement for working class education was always tied to more explicit political goals, with an emphasis on collectivism and communal responsibility (Kelley, 1992). In Chapter 8 I will present the evidence from my own data about the observed 'middle class culture' of U3A and how this is reflected in the backgrounds of U3A members and the ways they participate.

Within the U3A movement itself there have been critically different perceptions of

the central purpose of U3A, thus illuminating the different facets of the U3A's development. For Midwinter (1984), the main goal is to build up 'mutual aid connections' for older people (like the Pre-School Playgroup movement in Britain did for children), while Professor James, a psychologist and key contributor to the development of U3A, believes that it actually serves for 'psychological adaptation of older people'.

According to Prof. James, the U3A's first concern was to enable people to adjust to new situations, to feel secure inside and outside their homes, and to meet other people with whom they could relate. All this was seen as conducive to helping them invest in their strengths and interests in a congenial, supportive environment, whether they act as a group member or leader. People have different needs and the U3A seeks to offer opportunities relevant to all (personal correspondence with Prof. David James, University of Surrey, on 28th September 2010). He notes that a retired and/or bereaved person needs to cope with new situations in life by receiving security, support and comfort. Those who started U3A used the idea of Maslow's Hierarchy of needs as a guide (Maslow, 1970, p. 547-548).

The principle of mutual self-help has been central to the U3A organisation throughout its history. However, the above evidence shows that there is some diversity of views among the founders of U3A about what are its key purposes. Informal education in the UK has historically been associated with religious and middle class values, and so an important question in examining the workings of the U3A is the values and motivations of its members and leaders. In the following chapters I will analyse the data from the sample of three U3As in order to examine these issues.

6.4.2 SU in KOREA

Although, the SU is run by a non-governmental organisation (originally, several organisations), it can be described as a 'politically connected model'. KOPA started its operation in 1969, as a popular response to the absence of welfare policies for older people in Korea. In comparison with the British experience, welfare policies specifically for older people did not exist in Korea when KOPA started. In other words, KOPA was formed to promote the development of welfare

policies for older people, whereas U3A set out to supplement what already existed due to welfare policies for older people.

I argue that there are two factors that explain how SU has developed as part of a politically-driven strategy: first, the Korean government has enhanced the welfare system significantly since 1969 to include older people, and KOPA has enjoyed the benefits of national welfare policies; and second, since Korea was under non-democratic military rule from 1961 to 1993, the government controlled almost all aspects of public service, including the social-informal learning institutions, thereby focusing the need for campaigners to work more on government-led social and economic development.

It is easy to see why the needs of the elderly were not a priority during the chaotic national period of the 1950s and early 1960s, in the aftermath of two devastating wars. By the end of the 1960s however, KOPA was created as a response to the growing social pressure for investment into welfare for the elderly. KOPA became a non-governmental group (NGO) working for the government and able to request financial support from the state. (An NGO is defined as a non-profit, voluntary citizens' group which is organized on a local, national or international level.) First Lady Young-Soo Euk[15] provided a building that would serve as KOPA′s headquarters in 1972. When she was murdered in 1974, KOPA erected a monument to honour her. Through this, KOPA was able to win some attention from the President Park, and this made it easier for them to lobby for issues concerning older people.

KOPA did not consider education as a pressing concern when it started in 1969 but it began to acknowledge education of the elderly as one of its areas of concern in the late 1970s. When Gyu-Dong Lee, who was the father-in-law of President Cheon[16], became the President of KOPA, he merged the two big learning organisations of older people into KOPA's SU. It is worth noting that this took place under the military government, not under a democratic state. When the government asked KAEA to merge with KOPA, Dr. Doo-Chul Ha – one of the founders – expressed his distress saying, "I have no power to resist the

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[15] Young-Soo Euk (1925-1974) was the wife of President Park

[16] Doo-Hwan Cheon (1931~) was the 5th President of South Korea from 1980 to 1988.

governmental order to merge with KOPA. I am full of sorrow and tears." (KOPA, 1989, p. 56)

During the Asian financial crisis and the Kim Dae-Jung[17] administration (1999-2003), the matter of social welfare gained ground as a subject of mainstream political discussion for the first time in Korean history. Kim Dae-Jung's government developed a more systematic welfare policy, and expanded social welfare expenditure. The state launched a social welfare reform under the name of 'Productive Social Welfare (Sangsanjuk Bokji)', which expanded the coverage of social insurance programmes to a pension system, medical insurance, and unemployment indemnities.

Korean history shows that locally-organised informal education could develop independently from the government education system. However, under Japanese rule (1910 – 1945) and the military regime from the 1950s to the 1980s, informal education was controlled by the state (to guard against anti-government movements) and therefore had to be reliant on governmental authority.

On 16 May 1961, General Park took power through a military coup; he was able to set up a military government and exerted strong dictatorial power until his assassination in 1979. This President is acknowledged to have contributed significantly to the economic and educational development of Korea. Under the Five-Year Economic Plan, which started in 1962, the educational system included the expansion of lifelong education to encompass human resource development, community development, and industry development. Economic values dominated the period from the 1960s until the 1970s as the military government ignored other social values such as human rights, democracy and environmental protection (Park, S., 2002, p. 288). The Park administration attempted to reform society through social education, and to re-shape the fundamental rules of society (Choi, E., 2007, p. 108). During the 1970s, the state spearheaded the 'Sae-Maeul (New Village) Movement' to develop rural areas to shift from the pre-industrial stage to the industrial age, emphasising the spirit of diligence, self-help, and co-operation (Park, 2002, p. 287).

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[17] Dae-Jung Kim (1924-2009) was the 8th President of South Korea from 1998 to 2003.

The development of the SUs since the 1970s, under the organisational control of KOPA, and largely directed by national government policies, is clearly evident in the current culture of the SUs as formal and school-like. Management and programme decisions in SUs are top-down, and as we have seen, even informal subjects (singing, dance) are treated in formal ways. The SU continues to be affected by continual infighting between the Ministry of Education and the Ministry of Welfare, which have joint responsibility for educational provision to older people. The Lifelong Education Law includes SUs as learning institutions of older people, but the Elderly Welfare Law sees SUs as leisure facilities for older people. The consequences of this fight are evident is the SU learning programmes.

In the following chapters I will analyse the data from the sample of three SUs in order to examine how these tensions and issues are experienced by managers and SU members at the local institution level.

6.5 SUMMARY

This chapter has focused on the current status and the historical development of the UK's U3A and Korea's SUs. The historical and political roots and developments of U3A and SU have been very different, although both are responses to similar social experiences of an ageing society. U3A in the UK was established as an independent, member-led organisation due to the influence of both the self-help movement in a period of economic liberalism, and an emerging national debate on learning in later life. In contrast, the creation of SU in Korea has always been politically driven, and tied to government funding and policies.

Both institutions were established in their time due to the absence of governmental policies for the learning of older people. However, contrary to the British experience, specific welfare policies for older people did not exist in Korea when KOPA started. KOPA was therefore motivated to campaign for and develop welfare policies for older people whereas U3A has always worked to supplement the outcomes of welfare policies for older people which already existed. The philosophical basis of U3A is based on two features: the mutual-aid spirit of people marginalised from society (ie. the elderly), and the self-independent individualism that is typical of British middle class attitudes. KOPA

emerged out of a broad social movement for the welfare of the elderly in Korea. Under the non-democratic (military) government, it sought for political connection to expand learning opportunities of older people. Therefore, even though it was a non-governmental organisation, it was supported by the government, and required to work within government policy priorities.

The differences of institutional development related to national welfare systems in the two countries are captured in the diagrams in Figure 6-3. I stress that U3A has existed to fill a gap left by declining state-led education provision, while SU has always been tied to government educational programmes, which have indeed been expanding since the 1980s, and has worked within their frameworks, whilst also campaigning for the rights of the elderly. Table 6-2 shows a summary comparison of institutional development between U3A and SU.
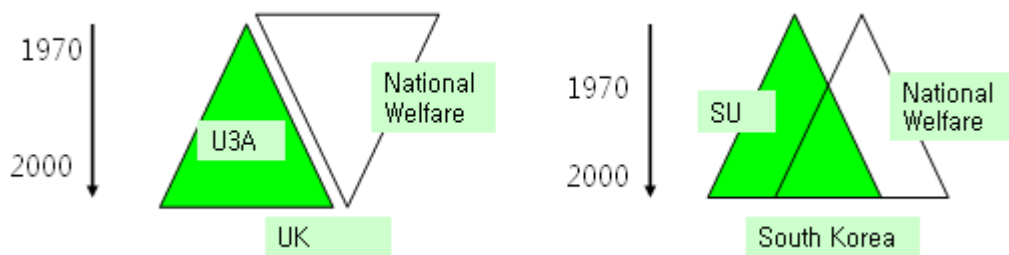
Figure 6-3 Differences of Institutional Development related to National Welfare in Two Countries

Table 6-2 Summary Comparison of Institutional Development between U3A and SU

	U3A –UK	**SU-KOREA**
Model	Mutual-aid or Self-help model	Organisation-led welfare model
Culture	Economic liberalism	Military government

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CHAPTER SEVEN: MODELS OF INSTITUTIONAL MANAGEMENT AND LEARNING AND TEACHING AT U3As AND SUs

7.1 INTRODUCTION

This chapter presents analysis of the data gathered from three U3As in 2006 and three SUs in 2007[18] by means of questionnaires filled in by representatives of each organisation. The information was triangulated by interviews and an analysis of relevant documents including leaflets and newsletters, issued from these institutions. All the data together were used to profile the three U3As and the three SUs in order to contextualize their management style and approach to learning and teaching. See Chapter Three for details of data collection methods.

The names of local areas and institutions were anonymised by means of initials to retain confidentiality. HL U3A and MA SU were large institutions; MT U3A and SC SU were located in relatively wealthy areas, whereas WF U3A and KD SU were in mixed areas in terms of ethnic composition in UK and socio-demographic background.

The purpose of involving the institutional representatives as principal providers of information for this study was to understand the two aspects of organisational characteristics related to learning: the management aspect and approach to learning and teaching. The approach to learning and teaching was in turn examined in two ways: the style of the curriculum provision and the teacher-student relationship.

This chapter concludes by discussing the similarities and differences of SUs and

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[18] To update the information about the number of members and annual fees (because fieldwork was done in 2006 and in 2007), email or telephone contact was made to three U3As and SUs in 2011.

U3As, and their cultural meanings, as derived from the data.

7.2 THE ORIGINS AND CHARACTERISTICS OF LOCAL U3As AND SUs

In this section, I will look at the origins of the three U3As and three SUs and describe some characteristics of those institutions, based on the representatives' responses in the questionnaires.

The first U3A in the UK was established in 1981. HL U3A began in 1983, MT U3A was established in 1984 and WF U3A in 1995. In the case of HL U3A, after reading a newspaper article by Michael Young and Peter Laslett on the philosophy of the U3A movement, three people decided to collaborate and placed a newspaper advertisement to recruit members to join a new U3A.

MT U3A was the first London Boroughs U3A to be formed. It was founded by a group of education specialists in 1984. It was initiated by DNS, who had worked as a university lecturer and lived locally. He thought there was scope for a U3A and in 1983 he put a paragraph in the MT Adult Education Institute Prospectus that attracted a variety of people coming from all walks of life. He worked with committees and contacted the official of the Further Education Department of MT and organized a steering committee composed of six members. They met about six times. Alec Briggs was the Treasurer and his recollection was that meetings dealing with constitution, finance, subscription and the name dragged on; he was unhappy with the 'University' part of the title. As an academic Douglas Norman-Smith thought that establishing networks with educational institutions would be beneficial in the long run, but some felt that any whisper of contact with colleges, education, study and classes would put people off. The Deputy Mayor, Dr. Eric Midwinter of the London U3A, and Douglas Norman-Smith delivered their messages during the launch event.

WF U3A started in 1995 as a branch of a nearby large U3A which had become oversubscribed (more than 500 members). An advertisement was placed to look

for a person who could start a new branch in the locality of WF. John Cowley responded to this advertisement and he put a note in the public library, saying he was looking for people who were interested in U3A. He called a meeting and six people attended. Those 6 people formulated a committee and looked for members; the U3A started with 21 members and grew to 230 (in 2006). WF is an area of significant socioeconomic deprivation (53rd most deprived local authority area in England, and four of its wards are among the 10 percent most deprived in the country (Bariso, 2008).

Compared to the similar origins of the U3As, the SUs have had a variety of origins. There were three ways of being established under KOPA. Firstly, SUs were established by executive members of KOPA branches because an SU was one of the business divisions of KOPA. SU were not regarded as a major division of KOPA and so were not established automatically at new KOPA branches, but only when executive members initiated them.

MA SU started in 1975, and was one of the earliest SUs in Korea. When it first started, it was for educating leaders of older people rather than for the education of members. SC SU started in 1990. Some executive members of this KOPA branch raised money in order to set up a senior class. At that time, there were fewer learning provisions in the locality than today. In 1990, there were 277 people in the first graduation. The SC SU representative reported that President Kim Youngsam visited this SU in 1990 to provide encouragement. The appointment of deans (one male and the other female) for this SU happened only in 2000, which means that for the first 10 years, the administration of SU was under the control of ordinary KOPA members.

Table 7-1 Established Year and Origin of U3As and SUs

	A [HLU3A-MASU]	B [MTU3A-SCSU]	C [WFU3A-KDSU]
UK	[1983] After reading an article in a newspaper by Michael Young and Peter Laslett, a group of three people got together and placed a newspaper advertisement [HLU3A]	[1984] U3A (M) was started by a Committee of education specialists [MTU3A]	[1995] When U3A (E) was oversubscribed, it placed an advertisement to look for a person who could start a new branch in the locality. John Cowley responded and he put a note in the library, saying he was calling for people who were interested in U3A. He called a meeting and to that meeting 6 people came along. These made a committee and started to look for members. It started from 21 members and now has 230. [WFU3A]
KOREA	[1975] The KOPA branch in this locality set up this senior class (ie. the original name for SU) as one of the KOPA divisions . [MASU]	[1990] There was no senior class at the KOPA branch in this locality until 1990. Some executive members of the branch collected money in order to set up a senior class. At that time, there was little learning provision in the locality, unlike today. [SCSU]	[1981] There was no senior class at the KOPA branch in this locality up to this year. Senior class could be set up by an individual application to KOPA head office, which was initiated by the director of KD KOPA. Initial recruitment of members was through advertising and also house to house visits by the executive members. [KDSU]

The second way of establishing an SU belonging to KOPA was that an individual could set up an SU with permission of a KOPA branch. In this case, the KOPA branch did not initiate the SU but just took SU under its umbrella. KD SU was an example of this case. KD SU began in 1981 through the effort of its Dean, Mr.

Kim. Next, I will address some characteristics of local U3As and SUs which the chairpersons of the three SUs and three U3As reported, or were observed in the site visits. HL U3A had five characteristics that distinguished it from other U3As. Firstly this U3A rented its own venues and did not meet in people's houses, as most U3As do. Secondly, it used the same building with the WAC[19] Performing Arts and Media College, which was for young people, and so members of U3A could meet young people in the same building. Thirdly, due to the local character, there were many retired academics who could give lectures. Fourthly, even though the membership fee was expensive, there were more than 130 subjects in which members could participate. Finally, unlike other U3As, (very) big classes of more than 20 and up to 100 were possible since there was a large lecture hall in the building.

The Chairman of MT U3A distinguished the British model of U3A from the French model in the following way:

> "We like the freedom to do it any way we like – and like to be able to do it badly if we enjoy it! We do not want certificates. We want to pursue enjoyment as a priority." (The chairman of MT U3A)

In the case of WF U3A, the background educational level of members was relatively lower than in the other U3A branches. Therefore, social aspects of activities were stressed more than the acquisition of academic knowledge. In addition, most of the members were female. The Chairperson had the opinion that men would prefer to go to the pub instead of joining learning activities.

The distinguishing feature of SUs from other learning institutions for older people in Korea is that they are part of a nationwide organisation; they have the highest number of members and KOPA executives are involved in SU activities. For example, a 'Long-life gym' was observed, which is not available in any other learning classes of older people. KOPA run the 'Employment Support Centre for Older People' which was funded by the government under the provision of welfare

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[19] Weekend Arts College

policy for older people (started in 1981 in the name of 'Older People Workforce Bank'; in 2013 there were 254 centres nationwide).

The MA SU had the largest number of members out of the 3 SU surveyed and the dean was relatively younger than the deans of other SUs. The dean (female) said that she used to be a nurse, so she knew how to serve and care for older people better. She reported that it would be good to have more physical space for the development of learning situations for older people. The dean of SC SU said that the KOPA SU had the largest number of students in Korea, and that executive members of the KOPA branch were involved in the SU in management and teaching. In 2011, when I contacted these SUs and U3As to follow-up on some information, two deans were still in post, while all three of the U3A chairs had been replaced.

7.3 INSTITUTIONAL MANAGEMENT

7.3.1 Membership/Scale

In principle, the total number of U3A members has no limit, but when classes are held in people's houses the size of each class will be restricted by the space available in each house. It was reported in the surveys that the ideal participant size of a U3A branch is between 300 and 500. However, because the general meeting (for monthly talk) was open for everyone, the number of participants could not be limited. The total number of U3A members is rising, according to Withnall (2011), "U3A has reported a considerable growth in membership in recent years (p. 96)." As regards Korean SUs, the ideal number of participants was decided according to the size of the meeting place. For extra-curricular activities, a relatively small class-size of 40 to 50 was considered ideal. Nationally, the total number of SU members had decreased since 2000 due to the increase in the number of welfare centres that provide free learning programmes.

Table 7-2 Membership and scale of U3As and SUs

		A [HLU3A-MASU]	B [MTU3A-SCSU]	C [WFU3A-KDSU]
Current number of members	UK	About 1500 [HLU3A]	300 [MTU3A]	230 [WFU3A]
	Korea	309 [MASU]	162 [SCSU]	110 [KDSU]
Qualification and age limit	UK	Provided you are no longer in paid employment. No age limit! [HLU3A]	Not in full-time employment. No age limit - 'but as a result we are all over 50' [MTU3A].	No particular age limit. Our U3A is open to everyone. No qualification limit. [WFU3A]
	Korea	Literate and local people [MASU]	No age and qualification limit! [SCSU]	No limit! [WFU3A]
Ideal participant size of your U3A	UK	-	300-500 [MTU3A]	300 [KDSU]
	Korea	360 [MASU]	About 200 [SCSU]	70 [KDSU]
Ideal participant size in each group	UK	Varies 5 to 150 [HLU3A]	Depends on subject and the room available. 5-15 normally is able. [MTU3A]	Depending on house size generally. [WFU3A]
	Korea	3 different classes. All members attend a class. Each class 100. [MASU]	Every member, 200. Extra-curricular 40-50 [SCSU]	40 [KDSU]
Changes in number of members	UK	(Stable) We have had the same numbers over the last 6 years. New members join and others leave for various reasons [HLU3A]	(Stable) [MTU3A]	(Stable) People leave through death, moving house, illness or lose interest. [WFU3A]
	Korea	-	(Decrease) In the beginning, there were over 300 but since the year 2000, the number has decreased due to the increase of welfare centres. [SCSU]	(Decrease) Monthly fee is decreasing to recruit more members; it was 10,000 won, to 5,000 won, and now 3,000 won. [KDSU]

U3As generally had more members than Korean SUs. In particular, one U3A had around 1500 members, which is generally possible because in the U3A model there is no class in which all members should participate. In Korea, the biggest SU

had around 300 members and this SU had to run several repeated classes for one subject, as SUs have all members enrolled in a class.

In the case of U3A, by definition, the membership included retired people, although it was open to everyone. In principle, if someone was in his/her 40s and did not have a full-time job, he/she could join U3A. In the case of SU, even if it was claimed that there was no limit in terms of age and qualification, there was by default an expected minimum age for membership. In Korea, 'senior' refers to those who are over 60, according to social convention, and according to Welfare Law, those over 65. It depended on the individual SU whether the entry age was set at 60 or 65. Of course, there was no limit in terms of qualifications; those who were illiterate might choose 'Literacy Class' which was arranged by the welfare centre of the SU.

At the time of the research, about 1500 members were registered with the HL U3A. Anyone who was not in full-time paid employment could be a member and there was no age or qualification limit. In the questionnaire responses, it was said that the ideal participant size in each group depended on the class and varied from 5 to 150. The number of members had been stable for the previous six years. New members joined and others left for various reasons.

MT U3A started with 20 members and it at time of the fieldwork had an average of around 300 members. By definition, the membership comprises retired people. The first impression was that there were more women than men. Those who are not in full-time employment can be members and there is no age limit −as a result, all members are over 50. On the projected ideal participant size of MT U3A it was said that between 300 and 500 members is ideal. It was said that the ideal participant size in each group depends on the subject and the room available. It seems that from 5 to 15 is usual. The MT U3A seems to have stabilised in overall size.

WF U3A started with 21 members and at time of the fieldwork was an average

sized U3A of around 230 members. There was no particular age limit to be a member. This U3A was open to everybody. No qualification was necessary. On the projected ideal participant size of WF U3A in the questionnaire, it was found that 300 members were ideal. It was also said that the ideal participant size in each group generally depended on the house size. It seemed that the WF U3A had stabilised in overall size.

MA SU is relatively large as compared with other SUs. It had at the time of the fieldwork around 300 members. The ages for membership eligibility were different from U3A. Even though the dean of the SU said that there was no upper age limit, there was a minimum age limit; normally only those over 60 or 65 could enter, depending on the local SU. Although there was no qualification requirement, the MA SU preferred those who were literate. It was thought that the ideal membership size of MA SU was 360, while the ideal participant size in a group was irrelevant because the SU successfully ran classes with all members present. SC SU had around 100 members and was a middle-sized SU. The ideal membership size was considered to be 200. For the extra-curricular (informal) activities, the ideal participant size was between 40 and 50.

KD SU had around 110 members at the time of fieldwork; therefore it was also a middle-sized SU. The dean of KD SU reported that an ideal class size would be 40 and overall membership in the current facilities around 70; however the dean wanted to expand membership, and to use this evidence of demand to appeal to KOPA and the local authority to provide new, expanded facilities. The membership fee had been reduced from £5(₩10,000) per month to £2 (₩ 4,000) per month, to encourage new members.

7.3.2 Marketing

According to the frequency of questionnaire responses, U3As advertised through: information at a library, word of mouth advertising, through a webpage (internet), placards/posters, and issuing a newsletter. Similarly SUs also utilised word of

mouth marketing, placards/posters, issuing a newsletter, and information at a library, and through a webpage (internet). In the UK, advertisements through library and webpages were popular but these methods were not fully utilised in Korea. Instead, advertisements through the newsletter of the local council and through elderly halls were common. In KD SU if a member was absent, the dean or other officer contacted the member's household in order to encourage attendance in classes.

Table 7-3 Marketing of U3As and SUs

	A HLU3A-MASU]	B [MTU3A-SCSU]	C [WFU3A-KDSU]
UK	1) library 2) internet 3) Word of mouth [HLU3A]	1) library 2) internet 3) Word of mouth 4) Placards/ Posters [MTU3A]	1) library 3) Word of mouth 5) Issuing newsletter [WFU3A]
KOREA	3) Word of mouth 4) Placards/ Posters [MASU]	4) Placards/ Posters 6) Other [SCSU]	1) Information at a library 2) internet 3) Word of mouth 4) Placards/ Posters 5) Issuing newsletter 6) Other [KDSU]

7.3.3 Premises

U3As normally held study group meetings in people's houses and did not have a fixed venue. SU used the building of the welfare centre or KOPA branch building, for free. HL U3A had rented part of a community hall. To cover the rent for this, the annual membership fee was higher than other U3As. Every learning activity of HL U3A took place in this hall. In the case of MT U3A, it was found that premises at the Adult Education College were too difficult to get to and noisy – so the culture of groups meeting in people's houses was followed. This helped avoid payment for rooms and enabled the subscription to be kept low. When necessary, a hired room could be used (their main choice hall was free to use). In WF U3A, there was no fixed accommodation and for general meetings they used the local

church hall (formerly they had used the council hall).

Table 7-4 Premises of U3As and SUs

	A HLU3A-MASU]	B [MTU3A-SCSU]	C [WFU3A-KDSU]
UK	Yes fixed place	No fixed place	No fixed place
	In one place, we rent rooms for all our activities. [HLU3A]	In members' homes or hired room [MTU3A]	Local church hall [WFU3A]
KOREA	Yes fixed place [MASU] (Building of welfare centre) [MASU]	Yes fixed place (KOPA local branch building)	Yes fixed place [KDSU] (KOPA local branch building) [KDSU]
		Hiring the county hall [SCSU]	

MA SU used the welfare centre building owned by the county council, for free. There were several classrooms and one large hall, enough to accommodate every member. There were also convenience facilities such as canteen, bath, hairdresser, exercise rooms for table tennis or sport-dance, to name a few. SC SU shared the local KOPA branch which had its own building. This building had five floors with a large hall that could accommodate a gathering of all members. There was also convenience facilities similar to those described for MA SU. This local KOPA branch ran a 'senior employment centre' and so there were many older people around the building. KD SU also shared the local KOPA branch which had its own building. For lectures, a large classroom was used while the large hall was used for activities.

7.3.4 Programme Evaluation

Normally the success of a programme was determined by word of mouth, by the degree of participant enjoyment and by an observed increase in the number of participants. U3As did not use formal evaluation but one institution of SU reported that it used formal evaluation.

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In the questionnaire, regarding the question 'What benefits does this institution expect participants to acquire', it was there were different understandings of the verb 'expect'. Korean respondents interpreted the question as what participants would get from SU 'in the future', so they focused on things they want to provide to participants for an improved learning situation, such as free courses, free snacks, free transportation, spacious accommodation and various programmes. U3A respondents mentioned enjoyment, meeting other like-minded people, happiness, developing a healthy mind, and acquiring new knowledge/information. These answers were interpreted as expecting something from inside (intrinsic), but SUs expected something from outside (extrinsic).

Table 7-5 Expected Benefits for Members of U3As and SUs

		A [HLU3A-MASU]	B [MTU3A-SCSU]	C [WFU3A-KDSU]
Expected benefit for members	UK	Enjoyment Meeting other like-minded people [HLU3A]	Happiness. Mentally less likely to get ill! [MTU3A]	Knowledge in subject Further interest in subject. [WFU3A]
	KOREA	Free course, snacks, and transportation for free in the future. [MASU]	More varied programmes and more space for programmes. [SCSU]	-

7.3.5 Funding and resource[20]

Most U3As were supported primarily by a participation fee and in some instances there were donations of 10 per cent. In contrast, local government in Korea granted a substantial amount of funds for SU running expenses. One institution had obtained financial support from KOPA. In the U3A, a membership fee of around £10 to £12 was collected annually. The membership fee of one institution was unusually more expensive, about £55. There was a discount for couples and concessionaires. SUs tended to have monthly fees rather than annual. One institution received both a registration fee and a monthly fee. Some older people

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[20] This has been followed up by contacting representatives again in 2011.

preferred monthly fees because they found it difficult to pay the annual fee in one goes.

<p align="center">Table 7-6 Funding and Fee of U3As (in 2006) and SUs (in 2007)</p>

		Funding	**A** **[HLU3A-MASU]**	**B** **[MTU3A-SCSU]**	**C** **[WFU3A-KDSU]**
Funding	UK	Local government grant	-	-	-
		Participation fee	90% [HLU3A]	90% [MTU3A]	100% [WFU3A]
		Gift/donation	10% [HLU3A]	10% [MTU3A]	-
		TOTAL	100%	100%	100%
	Korea	Local government grant	80% [MASU]	30% [SCSU]	20% [KDSU]
		Participation fee	20% [MASU]	56% [SCSU]	50% [KDSU]
		Gift/donation	-	14% [SCSU]	-
		Other			30% (KOPA) [KDSU]
		TOTAL	100%	100%	100%
Fee	UK	Registration fee	-	-	-
		Membership fee	£55 (single)/ £105 (double)/ £20 (concession) [HLU3A]	£10 annually [MTU3A]	£12 (single), £18 (couple) [WFU3A]
		Course fee	-	-	-
		Any other fee	-	Minor expenses for course (if any) [MTU3A]	
	Korea	Registration fee	-	-	£2.5
		Membership fee		Annual fee £25 [SCSU]	Monthly £1.50 [KDSU]
		Course fee	Monthly £1.50 [MASU]	-	-
		Any other fee	-	-	Small expenses are collected if necessary [KDSU]

HL U3A gets its funding from participation/membership fee (90 per cent) and gift/donation (10 per cent). A single person pays £55 per year (£67 per year in

2011), while a couple pays £105 and the concession fee is £20. As noted above, the annual membership fee in this HL U3A was relatively higher than other U3As.

MT U3A was funded by participation fee (90 per cent) and gift/donation (10 per cent). The annual membership fee was £10 for single people (£12 in 2011) and £18 for a couple (£20 in 2011) and minor/additional expenses were collected from the members of each study group whenever necessary. The groups were self-supporting, which meant that they sometimes ran a kitty for expenses such as coffee, biscuits, copying and telephone. However, some equipment was financed centrally. Around 1985, a grant of £300 from MT Council that was paid over 3 years helped put U3A on its feet financially. Since then the U3A had depended entirely on members' subscription. As registered charities, these groups had to be self-supporting and independent in order to meet the charity criteria. MT had benefited from a few bequests, which had cushioned the accounts and enabled it to purchase equipment, and rent alternative venues.

WF U3A got funded by 100 per cent participation fee. The annual membership fee was £12 (£15 in 2011) for a single person and £18 (£25 in 2011) for a couple. Each group paid its own small expenses, such as for coffee, tea or biscuits. According to the chairperson, the organisation applied to the council for funding but it was declined because there were only a few members of ethnic minorities in the membership.

On the other hand, MA SU was subsidised with an 80 per cent local government grant and 20 per cent participation fee. There was no annual membership fee but for egistration on a course, £1.50 (₩3,000) should be paid monthly. SC SU was funded with a 30 per cent local government grant, 56 per cent participation fee and 14 per cent gift/donation. When I followed up on this information in 2011, the percentage of local government support had increased to 65 per cent. The membership fee was 20 per cent and donation was 10 per cent. The annual membership fee was £25 (₩50,000) per person. KD SU is supported by a 20 per cent local government grant and 50 per cent participation fee. In addition, KOPA

provides 30 per cent of the budget and this was mainly used for the lecturers'
professional fees. The registration fee was £2.50 (₩5,000) and a monthly amount
of £1.50 (₩3,000) should be paid for membership. When necessary, a small kitty
was collected for expenses. The amount of grant from the local government was
variable, depending on the budget and policies of the local government.

7.3.6 Administrators

In the UK, each U3A had a committee to take overall responsibility for running
the organisation, whereas in Korea the dean had the responsibility for a SU.The
national 'Third Age Trust' in the UK does not exercise any control over U3As,
each one being autonomous. There is only an Annual General Meeting nationally
for all the local U3A representatives. Each local U3A pays a fee to the head office
for indemnity insurance (ie. Against any problem that might arise in running
activities for members), maintenance of the office, and for the running of the
Resource Centre. The Head Office gives legal advice and support to local U3As.

Table 7-7 Administration of U3As and SUs

			A [HLU3A- MASU]	B [MTU3A- SCSU]	C [WFU3A- KDSU]
Responsibility of administration	UK		A committee of 16 members [HLU3A]	Committee & members (e.g. Group leader) [MTU3A]	A committee of 10 [WFU3A]
	Korea		Dean of SU [MASU]	Dean of SU [SCSU]	Dean of SU [KDSU]
Committee	UK	Committee	Yes [HLU3A]	Yes [MTU3A]	Yes [WFU3A]
		How many	16 [HLU3A]	12 [MTU3A]	10 [WFU3A]
		Who they are	People elected or members whom we consider suitable [HLU3A]	Chairperson, Vice-chair, Secretary, Treasurer, Newsletter editor, Group coordinator, Catering,	

			Depending on the skills of the members. Usually have chairperson. [MTU3A]	Hospitality, Publicity, Membership secretary [WFU3A]	
	Korea	Committee	Yes [MASU]	Yes [SCSU]	Yes [KDSU]
		How many	40 [MASU]	4 [SCSU]	7 [KDSU]
		Who they are	Directors and Steering Committee: Chairman, Vice-chairperson and Treasurer [MASU]	Chairman, Dean, 2 Vice-deans[SCSU]	Chairman, Vice-chair, Manager, Directors and board members [KDSU]
Headquarters	UK	How involved	We do not make much use - attend Annual General Meeting. [HLU3A]	Disseminates a few ideas. No control! [MTU3A]	The WF U3A is entirely autonomous [WFU3A]
		What support	No[HLU3A]	Legal, insurance, resources [MTU3A]	Excellent advice and back-up [WFU3A]
		Reasons to be under the U3A	Because we felt these were the right ones [principles]. We were very anxious to set up a self-help organization for retired people. [HLU3A]	We like the principles established by the Trust. We join for the insurance they offer, the legal advice and in order to keep in touch with other U3As. They have teaching material we can borrow. [MTU3A]	Third Age Trust is umbrella group and U3A is philosophy. [WFU3A]
		Capitation fee: usage and benefits	Yes, for the running of the head office. [HLU3A]	Yes [MTU3A]	Insurance which can cover any problem of member activity [WFU3A]

		Usefulness	It is useful. They have a good resource centre. It is useful to get to know other U3As. [HLU3A]		
		Constitution	We wrote it with professional advice. [HLU3A]	We used a U3A Trust constitution with minor amendments. [MTU3A]	
	Korea	How involved	20% of programme and constitution are supported[MASU]	Seoul KOPA Association [SCSU]	-
		What support	No [MASU]	'Arts Festival and Sports day' twice a year [SCSU]	Lecturer payment expenses, monthly [KDSU]
Paid staff	UK		No [HLU3A]	No [MTU3A]	No [WFU3A]
	Korea		Yes (5) [MASU]	No [SCSU]	No [KDSU]
Mission change	UK		-	Not much change. Each group leader does it as they wish. [MTU3A]	-
	Korea		Stable [MASU]	Stable [SCSU]	Stable [KDSU]

As SUs were organised under the local KOPA, there was a strong relationship between the two institutions. Even though there was no direct control, KOPA lent advice about the programmes and the constitution and encouraged each local SU to participate in Arts Festivals or Sports Days. Moreover, in some cases KOPA provided financial support to local SUs.

Since U3A was a self-help group, members delegated jobs among themselves without being paid. In the case of the SU, generally there were no SU paid staff but the staff of the KOPA branch carried out jobs for the SU whenever necessary. One SU in the sample, which had its own independent building, had 5 paid staff to perform management and administration.

One U3A chairman had the view that U3A was a philosophy and a movement. The group leaders could decide their own group's mission (objective). The SU reported that their mission was stable without a need for change. The objectives of one U3A were: "[i] To advance the education of the public and in particular the education of middle-aged and older people who are not in full-time gainful employment in WF and its surrounding locality. [ii] The provision of facilities for leisure time and recreational activities with the object of improving the conditions of life for the above persons in the interests of their social welfare." The objectives of one SU were: "[i] To establish respect for all senior persons' image by educating them and to promote effective administration of SU by co-operating with other organizations. [ii] To improve the dignity of seniors in order to be respected in a community. [iii] To improve adaptability in modern society. [iv] To develop the potential of seniors and [v] to help those live meaningful lives by providing knowledge about health management."

A committee of 16 members had the responsibility to manage HL U3A. Committee members were elected by the members at the Annual General Meeting, with postal voting being available. All elected Committee members served for one year, beginning right after the Annual General Meeting and a member could not serve on the committee for more than four consecutive years. The U3A office was run by volunteers. HL U3A did not utilize the Third Age Trust much but the respondent felt the head office was useful because it had a good resource centre. HL U3A sent £2.50 per member to the U3A Trust in 2006, which was used for insurance and expenses of the head office. Regarding the U3A constitution, the respondent reported that it was developed after professional consultation when they started in 1983, and it was amended in 2002.

To the question of who has the responsibility for running MT U3A, the chairperson replied that a committee formed of members (including group leaders) was responsible. The usual number of committee members was 12, depending on the skills of the members, and it usually had one chairperson. To the question of whether the Third Age Trust exercised interest (and control) in local programmes, the reply was that there was no control and it just disseminated new ideas, which were useful to local U3As. MT U3A aimed to get three kinds of support from the Third Age Trust and these were: legal advice, insurance and resources. When asked why this institution placed itself under the umbrella organisation of U3A Trust, the respondent said that "we like the principles established by the Trust. We joined for the insurance they offer, the legal advice and in order to keep in touch with other U3As. They had teaching materials which we could borrow." MT U3A gave £2.50 per member to the U3A Trust in 2006, which insurance to the U3A. Regarding the U3A mission statement, the respondent reported that it had not changed much since the beginning, and that each group leader charted their own mission as they wished.

In reply to the question of who had the responsibility for running WF U3A, the chairperson stated that a committee of 10 is responsible. This consisted of: chairperson, vice chair, secretary, treasurer, newsletter editor, group coordinator, catering, hospitality, publicity and membership secretary. The chairperson served for three years. The committee gathered once a month. WF U3A used the constitution that was provided by U3A Trust and amended it if necessary. To the question of whether the Third Age Trust exercised interest (and control) in local programmes, the reply was that the WF U3A was entirely autonomous. WF U3A got support from the Third Age Trust; it provided excellent advice and back-up. A fee of £2.50 per member was sent to the U3A Trust for insurance in 2006. There was no response to the question regarding organisational mission.

To the question of who had the responsibility for running MA SU the dean of the SU replied that she was responsible. The number of committee members was composed of 40 directors including the steering committee. Every decision was

made at a meeting of directors. To the question of whether the ʿKOPA Head Office' exercised interest (and control) in local programmes, the reply was that KOPA head office supported 20 per cent of programmes and the constitution. The mission had not changed over time.

To the question of who had the responsibility for running SC SU, the dean of the SU replied that he was responsible. There were no paid staff and the KOPA administrator did the job for the SU as well. There were four committee members: the director of KOPA, the dean and two vice-deans. To the question of whether the KOPA Head Office exercised interest (and control) in local programmes the reply was that the Seoul KOPA Association rather than the head office exercised interest in this local SU. Seoul KOPA Association promoted an ʿArts Festival and Sports day' twice a year. The mission had not changed over time.

To the question of who had the responsibility for running KD SU, the dean of SU answered that he was responsible. There was no paid staff but the KOPA administrator worked for the SU as well as for KOPA. The number of committee members was seven: the director of KOPA, the vice-director, the manager and four ordinary members. There was no response to the question of whether the KOPA Head Office exercised interest (and control) in local programmes. KD SU received support from KOPA for the payment of lecturers. The mission had not changedover time.

7.3.7 Local Government Support

U3As received no support from local government, while for SUs local government, at city or borough level, provided financial support for the payment of lecturers or to fund events. Local U3As were autonomous and tended not to expect any support from (local) government, whereas SUs expected financial support from the local government, with the expectation that the SUwould have sufficient funding to provide free courses and free learning activities in the future. The last question of the questionnaire to the representatives of local U3As and

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SUs, was a free text question about what was the best way to improve its organization. These responses were followed up by contacting representatives again in 2011.

Table 7-8 Local Government Support of U3As and SUs

		A [HLU3A-MASU]	B [MTU3A-SCSU]	C [WFU3A-KDSU]
Current support	UK	None [HLU3A]	None. Slightly obstructive but likes to take credit [MTU3A]	None [WFU3A]
	KOREA	Financial support for the payment of lecturers every month from City Hall [MASU]	Financial support for some events from the Borough [SCSU]	Financial support of 200,000 won per month from the Borough [KDSU]
Expected support	UK	None [HLU3A]	Publicity and thanks. [MTU3A]	-
	KOREA	Financial support for the full expenses of lecturer and free field trips [MASU]	Financial support for all expenses for free provision [SCSU]	More funds for lecturer payment [KDSU]

HL U3A did not receive any support from the local government and did not expect any subsidy in the future. MT U3A did not receive any support from local government in 2011 and described the local government as 'slightly obstructive'. The branch would have liked to receive some recognition from the local government because of its contributions to the learning development of older people. WF U3A did not receive any support from the local government in 2011, but for a new event called 'Neighbourhood Event', which was a sort of party for local people, the county council gave an amount of £300.

The representatives of SUs also mentioned that the governmental support was necessary for the development of the organisation:

> *"For the development of SU, the financial support from the government is necessary. Especially, I think the support is*

needed for older people who are under average level of living."(The chairman of KD SU)

"*I also think that for the development of SU, this organisation is better to be included under governmental control.*"(The chairman of SC SU)

MA SU received monthly support from the City Hall for payment of lecturers, but this SU hoped for more funds because it wanted to ameliorate the lecturers' professional fees and would like to provide free field trips for its members. SC SU received support from the Borough for some events. It was hoped that one day SU would be able to provide all learning programmes free of charge to all. KD SU received support of £100(₩200,000) per month from the Borough.

7.3.8 Participants

In the questionnaire to the representatives of the local U3As and SUs, there was a question asking to report on the general economic and educational levels of the participants in each institution, using a 5 point Likert scale from 'very high', 'high', 'normal (average)'[21], 'low' and 'very low'. There was a contrast between U3A and SU in terms of economic and educational levels reported by the representatives. First of all, on an economic level, U3A participants were seen as normal to very high while SU participants were seen as very low to normal. Even though this is not the case for all members, some members of U3A had houses large enough to cater to the 5 to 15 members of a study group. In Korea, the common attitude among those who are well-off is not to attend SU or welfare centres because they see them as organisations for 'average' people (Na, H., 2004).

Secondly, for educational level, U3A participants were rated from 'normal' to very high while SU participants were seen as low to normal in educational background.

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[21] The descriptor 'normal' was used for the middle point of the Likert scales, which was used to avoid confusion with the instruction that respondents consider backgrounds of users 'on average'.

In most instances within the U3A group leaders were retired academics or teachers, or professionals of some kind and so the average level of education was higher compared to SU. In Korea, retired academics or teachers tended to be speakers rather than just members. In SU there was the concept of teacher and students, not members, and therefore retired professionals usually took the teaching role rather than that of a student. In the participants' questionnaire conduced for this research, U3A members had a more professional background, although the majority of SU members were non-professional.

Table 7-9 Characteristics of Members of U3As and SUs, as Identified by Chairperson, using 5-Point Scale

		A [HLU3A-MASU]	B [MTU3A-SCSU]	C [WFU3A-KDSU]
Economic level	UK	Normal [HLU3A]	From normal to very high [MTU3A]	Normal [WFU3A]
	KOREA	Low [MASU]	Normal [MTU3A]	Very low [KDSU]
Educational level	UK	Between normal to high [HLU3A]	From normal to very high [MTU3A]	Normal [WFU3A]
	KOREA	Low [MASU]	Normal [SCSC]	Normal [KDSU]

To the question about the economic and financial level of participants the respondents reported: HL U3A participants' economic level was at the midpoint 'normal' and educational level was rated between the midpoint of 'normal' and high; MT U3A participants' economic level was rated from normal to very high and educational level was between normal and very high, which indicated that MT U3A consisted of relatively highly educated and well-financed members; WF U3A participants' economic level and educational level were both rated as the midpoint 'normal'. MA SU participants' economic level was rated low and educational level was also low; SC SU participants' economic level and educational level were both rated at the midpoint 'normal'; and KD SU participants' economic level was rated very low and educational level as 'normal'. When this question was asked, definitions of the terms low, normal, and high were

not provided, so the responses are all based on self-perceptions.

In the U3As, the respondents' most frequent response to the question as to why people participated in the U3A was: easy transportation, reasonable fee (concession policy), a lot of activities, good teachers and accessible time-table (day classes). The second most frequent responses were: excellence of programmes, good teaching methods and good teachers. In the case of SU, the most frequent responses were excellence of programmes, good teaching methods and good teachers. The second most frequent responses were: a lot of activities and accessible time-table (day classes). Unlike U3A members, SU members regarded easy transportation and reasonable fees as the least important factors. In both countries, lack of information was the most frequently chosen reason for the lack of participation among elderly people. In Korea, members of all three SU chose health as a reason for non-participation. UK members identified lack of motivation or interest as a reason for non-participation, whereas Korean members mentioned more insufficient financial resources for payment of tuition fees.

Two institutions in each country said that they tried to recruit members from different socio-economic backgrounds, diverse age groups among seniors, and the physically impaired. HL U3A had a concession for those who could not afford the annual fee, and audio-visual support equipment was available for deaf and blind people. MT U3A said that they had tried, but found it impossible as a volunteer organization. The chairman of MT thought that having a public place for gathering would encourage new members who could not provide their own houses. The chairman of the Great London Regional Forum of U3As reported her experience that informal interactions, such as involving communal cooking and eating, could be successful to bring down social divides between people. WF U3A was situated in a place where various ethnic minority groups live, and they had tried to recruit from ethnic minorities but had found that people tended to have their own clubs or centres. Only one SU answered this survey question: SC SU provided seats and concessionary fees, and families could accompany disabled members during field trips or outings.

7.4 APPROACHES TO LEARNING OF THE U3A IN THE UK AND SU IN KOREA

Two criteria were used in this study to differentiate the pedagogical model and andragogical model of learning: curriculum choice pattern and teacher student relationship. First, the curriculum provision-choice forms could be analysed as to whether the curriculum was offered as a single subject or multiple subject-based course. If it was single-subject based, this meant that students could select the subjects they wanted. If it was multiple-subject-based, students could select individual courses but the subjects covered in the course were already defined, and students could not change them.

Second, regarding teacher-student relationship, teachers could be classified in various styles. Normally, the research literature discusses teacher styles in terms of teacher leadership style or teacher communication style. However, in this study, the focus was to clarify whether the role of teacher-student was changeable or not. If the role was changeable, the relationship of teacher-student would be more similar to tutor-participant. Jarvis (1985) expresses this in another form: in a pedagogical approach the learner is dependent whereas in an andragogical approach the learner moves towards independence. In andragogy, students are self-directed, and teachers encourage and nurture this movement whereas in pedagogy, the teacher directs what, when and how a subject is learned. Therefore, in this study, a fixed curriculum and fixed role of teacher-student was defined as a pedagogical model whereas a selectable curriculum and changeable role of teacher–student was defined as an andragogical model.

7.4.1 Curriculum and Teaching-Learning Method

In the mode of delivery of programmes, there was a big contrast between the two countries. U3A was subject-based while SU was course-based. Subject-based meant that members chose the classes they wanted to join. Course-based meant that once you entered the course, you had to follow the curriculum of that course without selection. The course-based approach reflects the approach of the school

system and formal learning. And in the questionnaire responses, U3A respondents had the view that they considered learning as informal, whereas SU respondents considered learning as formal.

Figure 7-1 showed an example of a subject-based approach of U3A in the UK. Learning could be organized in various places at the same time and the frequency of the meeting and learning methods were all different according to subjects. Whereas, as shown in Figure 7-2, SU took place once or twice per week and the learning schedule was fixed as like school curriculum. Therefore, although the programmes for older people in the UK and Korea were similar like academic lectures, singing, dance, activities, etc., the mode of the delivery was different.

	Mon	Tue	Wed	Thu	Fri
Location 1	Subject 1 (academic-discussion)		Subject 1 (academic-discussion)		
Location 2		Subject 2 (dance)		Subject 2 (dance)	
Location 3	Subject 3 (singing)				Subject 3 (singing)
Location 4	Subject 4 (walking)	Subject 4 (walking)			
Location 5			Subject 5 (language)	Subject 5 (language)	
Location 6 ... Etc.				Subject 6 (academic-lecture)	Subject 6 (academic-lecture)
Social activities					

Figure 7-1 Example of a Subject-based approach (U3A)

	Mon	Tue	Wed	Thu	Fri
Location 1 (Formal Schedule)			Lecture		
			Activity		
Extra-curriculum					
Social activities					
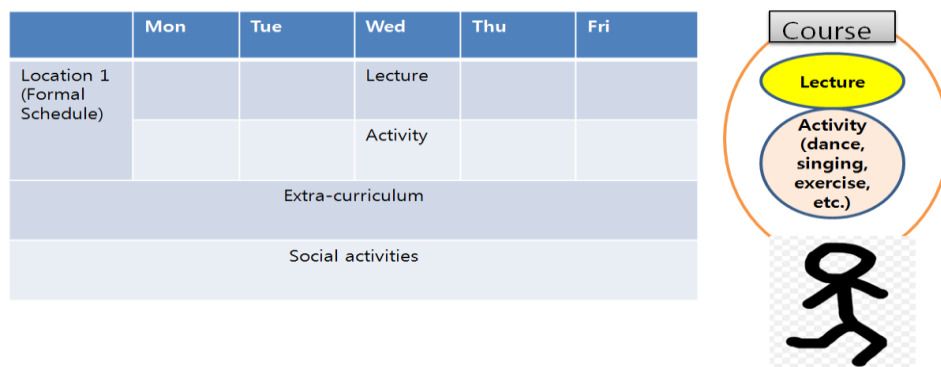
Figure 7-2 Example of a Course-based approach (SU)

In the subject-based approach, because members were able to choose what they wanted, there needed to be a variety of subjects available. Normally, 7 to 12 members were registered in each U3A subject group. The subjects offered by U3A could be categorised into three areas: academic subjects, practical skills and fun (recreational) activities. Common academic subjects included Architecture, Art, Cinema, Culture, History, Linguistics, Literature, Medicine, Philosophy, Politics, Psychology, Religion, and Science. Common practical skills were Art Appreciation, Computers (Word Processing, Excel, Email etc.), Languages (French, German, Spanish, Italian, and Chinese), Music appreciation, Photography, Playing, Practical art (Drawing, Painting, and Stained Glass etc), Reading, and Writing. Fun activities were Dancing, Exercise (Tai Chi, Yoga, Gi Gong etc.), Games (Scrabble, Bridge, Word cross, Rummikub etc.), Singing and Walking.

In Korea, one SU had three courses and each course consisted of twenty-four subjects; however, the twenty-four subjects were very similar and could be categorised into four areas: lectures, singing, dance and exercise. Basically, the course was divided into two parts: lecture and activity. These four categories were the same as in other SUs. The most common subject of lectures was health.

Table 7-10 Curriculum and Teaching-Learning Methods of U3As and SUs

		A [HLU3A-MASU]	B [MTU3A-SCSU]	C [WFU3A-KDSU]
UK (Subjects)	Subject or Course	Subject-based [HLU3A]	Subject-based [MT U3A]	Subject-based [WF U3A]
	Informal or Formal	Informal learning [HLU3A]	Formal learning Informal learning [MT U3A]	Informal learning [WF U3A]
	No. Subjects Provided	130 (132 in programme book) [HLU3A]	36 (85 in programme book) [MT U3A]	29 [WF U3A]
	Class like	Lecture, seminar, study group, discussion group, research seminar etc. [HLU3A]	Varied. Formal/informal. Didactic/cooperative [MT U3A]	Learning-based but with social aspects too. [WF U3A]
	*Social activities	Occasional outings, concerts [HLU3A]	Monthly talks are 40% social. Two parties a year [MT U3A]	Parties or socials at midsummer and Christmas [WF U3A]
KOREA (Course and subject in a course)	Subject or Course	Course-based [MA SU]	Course-based [SC SU]	Course-based) [KD SU]
	Informal or Formal	Formal, school style [MA SU]	Formal learning [SC SU]	Formal learning [KD SU]
	No. courses (Subjects)	3 (24) (4 Categories: lecture, singing, dance, exercise) [MA SU]	1 (5) (Lecture, singing, Kooksun-do, choir, dance sports) [SC SU]	1 (5) (Lecture, dance, singing, exercise, traditional music) [KD SU]
	Class like	Lecture and activity Two sessions per week One session two hours [MA SU]	Every Tuesday One session One hour for lecture (Welfare, health, current affairs etc.) One hour for music Extra-curricular [SC SU]	Twice per week Beginning with national anthem, school song [KD SU]
	*Social activities	Dance, singing, language, and mountain climbing clubs [MA SU]	Kooksun-do, choir, and sports dance [SC SU]	Historical place visits, field trips and industrial sightseeing [KD SU]

At U3A, people gathered in people's houses, during daytimes, there was no restriction by syllabus, examinations or qualifications. The way of working varied from prepared talks to participating workshops. There was a wide variety of

activities such as social gatherings, formal lectures and travel. In most U3As, academic lectures, discussion groups, language practice, games, physical activities, study trips, music and arts, and others were used as learning activities. Regarding the discussion group, which was a more usual learning method in the UK than in Korea, the representative of the Great London Regional Forum of U3As reported in interview that the using of that method was decreasing because strong conflicts among older people were becoming more common because older people tended to have strong opinions which had been shaped hard through their lives. As for social activities, there were occasional outings, concerts and parties during summer or Christmas. The monthly talks were considered important as a means of networking because after a speech by invited guests there was time for refreshments.

At SU, lectures and activities were held in a fixed location. Normally SU classes were held twice a week and extra-curricular activities tended to happen after the fixed schedule or on other days. Some SUs started the day by singing the national anthem and university hymn. The daily programme was usually a mixture of academic lectures, discussion groups, language practice, games, physical activities, study trips, music and arts, however language practice and group discussion were not frequently used. The SU tended to consider themselves as beingformal schools even though the subjects or programmes were not academic. Therefore, there was an emphasised difference between course schedules and extra-curricular activities even though the real contents of the activities were mostly the same. Extra-curricular activities were considered as social activities that included dance, singing, language, mountain climbing clubs, Kooksun-do, choir and sport-dance clubs. In addition, there are also visits to historical places, field trips and industrial sightseeing.

As to how the study programmes were decided, the U3As showed clearly that the programmes were determined mainly by the members first and by curriculum committee. All three institutions of SU reported that the participants' partially had an influence on determining programmes. Other determining factors were shown

to be determined by various groups: the curriculum committee, other SU staff, influences of other programme models, and the availability of pre-packaged modules. On the question of how the head office of SU exercised interest in local SUs, one institution reported that central KOPA provided 20 per cent of programmes. Although participants in both institutions, U3A and SU, appeared to have opportunities to influence the programmes, there was a contrast. In U3A, if there are any members who can provide programmes that other participants want to have, the programmes could be offered and provided. However, in Korea, even though members express their opinion on which specific programmes are wanted, the committee could decide within the budget to recruit lecturers or teachers for the programmes.

Regarding which programmes should be the priority, all three U3A and all three SU groups said that it was leisure and hobbies, followed by general and academic courses. None of the SUs mentioned vocational or skills acquisition and only one U3A. Regarding opinions about which learning activities older people tended to like the most, there was a clear contrast between the two countries. U3A thought that participating in discussions and practising skills (e.g. for language learning) were the most enjoyed activities, while SU mentioned listening to lectures and involvement in informal activities (singing, dancing) as the most enjoyed activities.

HL U3A was subject-based, and members could choose and join any subject they wanted. About 130 subjects were offered. Learning activities consisted of academic lectures, discussion groups, language practice, games, physical activities, study trips and music and arts. In addition to learning activities there were social activities such as occasional outings and concerts. This U3A considered learning as informal rather than formal. Programme subjects were determined by the curriculum committee, and members. On the question of what kinds of programme should be the main focus in older people's learning provision, the replies emphasized general and academic courses and leisure or hobby programmes. The teaching or learning methods were various such as lecture,

seminar, study group, discussion group, research seminar and so on. On the question of what kinds of learning activities older people liked the most, they replied: listening to lectures, joining in discussions and practising skills (e.g. for language learning).

MT U3A was also subject-based and about 36 subjects were actively being offered and the number of subjects in the programme book was 85. The monthly talks were regarded as social activities in addition to learning activities because they consisted of social events, and there were two parties a year. MT U3A considered learning as both informal and formal. Programme subjects were determined by members. The chairman said that the programme should be a balanced blend of all these, except for the vocational. The teaching or learning methods were varied, being formal/informal and didactic/cooperative. Class size was normally between 3 and 13. On the question of what kinds of learning activities older people like the most, no preference was expressed, with comments like, "We like all the activities." Learning activities consisted of academic lectures, discussion groups, language practice, games, physical activities, study trips and music and arts.

WF U3A was subject-based and about 30 subjects were offered. The chairperson explained the reasons for this compared to other U3As, there were few academic subjects because the general educational level of members was relatively lower than in other areas. The local population consisted of many ethnic minority groups, for instance, 37 different languages were used in their local primary school. There were some social activities at the general meeting that was held once a month, which was considered an important way to make friends. There were parties at mid-summer and Christmas and social activities besides learning activities (I participated in a Summer Social event on 18 July 2006). WF U3A considered learning as informal. Programme subjects were determined only by members. On the question of what kind of programme should be prioritised for older people's learning, only leisure or hobby-related programmes were mentioned. The classes in this WF U3A were learning-based but with social aspects too. Of the various learning activities, discussion groups were the most preferred activity in this U3A.

MA SU was course-based, which meant that members could not select which class to attend; however, there was no compulsion to attend a particular class if a person didn't feel like it. There were three courses and each course consisted of twice weekly sessions of two hours each. Generally, one session was for a lecture and the other was for activity. Programme subjects were determined by the participants, and by the influence of other programme models. As the main focus of older people's learning, only leisure or hobby programmes were mentioned. The older people expressed liking activities more than lectures.

SC SU was course-based and there was one course. The course consisted of twice weekly sessions and each session lasted for two hours. Generally, one session was for lectures and the other was for singing. There were three extra-curricular activities: Kooksun-do (a kind of Korean martial art), Choir, and Sport-dance. SC SU considered learning as formal and pursued a formal school style. Programme subjects were determined by curriculum committee, SU staff and participants. General and academic courses, and leisure or hobby programmes, were reported as the main focus of learning provision for older people. Listening to lectures and involvement in activities were thought of as the learning activities older people liked the most.

KD SU was course-based. There was one course and the course consisted of a four-hour session once a week. Generally the session took place every Friday afternoon. The course consisted of five different subjects: lecture, traditional music, popular singing, folk dance and health exercise. There were social activities aside from visits to historical places, field trips and industrial sightseeing. KD SU considered learning as formal and pursued a school style. General and academic courses and leisure or hobby programmes were reported as the main focus of learning provision for older people. The dean said that older people liked the singing programmes the most. Every Friday SU began with the national anthem and university song.

7.4.2 Teacher-Student Relationship

In this study, U3A was found to have the andragogical model for teacher-student relationships while SU had the pedagogical model. The role of teacher and student was changeable, and learners tended to be self-directed in U3A. In SU, the role of teacher and student was rigidly differentiated and students tended to be dependent on teachers' guidance.

Table 7-11 Teacher-Student Relationship of U3As and SUs

			A [HLU3A-MASU]	B [MTU3A-SCSU]	C [WFU3A-KDSU]
UK	Leaders (Tutors)		A lot of them are retired teachers or academics. [HLU3A]	Members with special interests or skills. Never paid. [MTU3A]	Volunteers mainly [WFU3A]
	Invited speaker		Yes [HLU3A]	Yes [MTU3A]	Yes [WFU3A]
		How often	Once a week [HLU3A]	Every month. [MTU3A]	Once a month for monthly meeting. [WFU3A]
		Payment*	Nothing (Travel expenses and bottle of wine) [HLU3A]	From 0 to 70 pounds [MTU3A]	Payment varied from 50 pounds to 100 pounds. But if speaker is a group leader, we do not pay. [WFU3A]
KOREA	Leaders (Speakers)		University professors or popular lecturers with special qualification [MASU]	Professional singer, choir led by retired music teacher, most lectures by retired professors, dance led by retired teacher, and leader of Kooksun-do supported by National Health Insurance [SCSU]	University professors or popular lecturers with special qualification [KDSU]
		Payment[22]*	£25 [MASU]	£40~£50 [SCSU]	£25 [KDSU]

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[22] Payment data: U3A in 2006 and SU in 2007.

U3As did not pay for tutors; they preferred to rely on the skills of their own members and this lessened their expenses. Special speakers were normally invited once a month for the monthly meeting, except in the case of one institution that invited special speakers once a week. Tutors were not paid, but speakers were paid on a range from nothing to £100 (speakers who were members or group leaders were not paid). In the SUs, unlike U3As, most leaders were invited from different organizations rather than internally, so there was no special differentiation between leaders and speakers. They were generally university professors or popular lecturers with special qualifications. Class leaders or speakers were paid from £25 (₩50,000) to £50 (₩100,000) for a one-hour hour class in 2007.

In HL U3A, most tutors or leaders were retired teachers or academics, and members of the U3A. Once a week there was an invited speaker and nothing was paid to the speaker. In MT U3A, most tutors or leaders were members with special interests or skills and they were not paid. There was an invited speaker every month and he/she got paid on a range from nothing to £70 depending on the situation. Most tutors or leaders in WF U3A were mainly volunteers with special interests or skills without being paid. There was an invited speaker every month for the monthly meeting and payment varied from £50 to £100 pounds, but if the speaker was a group leader (member) they didn't get paid.

Most lecturers in MA SU came from other institutions instead of coming from the organisation itself. There were 32 lecturers invited during the period of investigation and all were university professors or popular lecturers with special qualifications. £25(₩50,000) was paid for an hour lecture. In the case of SC SU, the singing was done by a professional singer, the choir was led by a retired music teacher, most lectures were given by retired professors, dance was provided by a retired teacher and the leader of Kooksung-do was supported by the National Health Insurance. Class leaders were paid £40~£50 (₩80,000 ~ ₩100,000) for an hour class. In KD SU, most lecturers and leaders of classes were from other

institutions rather than from among the members themselves, and they were generally university professors or popular lecturers with special qualifications. £25 (₩50,000) was paid for an hour class.

7.5 CULTURAL MEANINGS OF SIMILARITIES AND DIFFERENCES BETWEEN U3A AND SU

This section will cover the cultural meanings of the observed differences and similarities in styles of learning and curriculum and methods of teaching. The key differences and similarities in terms of management can be categorised in six points[23] and these points support the characterisation of U3A as a 'self-help model' and SU as organisation-led, as discussed in Chapter Six. In addition to management aspects, the teaching and learning approaches of U3A and SU, suggest that U3A has the 'andragogical model' and SU has the 'pedagogical model'.

U3A used the buffet-style of curriculum while SU used set-menu style. The buffet style offered curriculum based on subject-centered, meaning students can choose subjects of their choice. The curriculum of set-menu is course-based, meaning students have to choose a course which consists of several subjects. The relationship between teachers and students in U3A was horizontal while it was vertical in SU.

U3As tended to have an orientation towards informal learning; each was self-governing and projected the andragogical model of learning. Each SU tended to

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[23] (1) U3As conduct their meetings in member's houses or community halls while SUs convene classrooms in welfare centres or branch buildings of KOPA. (2) U3As do not limit their membership while SU does whenever they agree to gather at a particular place. (3) U3As use a library for disseminating learning or class opportunities while SUs did not use libraries often. (4) The two institutions agree that their programmes were mostly popularized by word of mouth. (5) U3As can stand on their own through independent funding while the SUs had to depend on local government support. (6) In terms of relationships between the head quarters and local branches of each institution, the local KOPA is supervised by its headquarters while the Third Age Trust does not control any of its local branches.

be formal in its learning orientation, dependent upon the government or headquarters' assistance and exemplified the pedagogical model of learning. According to Han's classification (2002a), U3A had a 'learningism' orientation while SU had an 'educationism' orientation (see Chapter Two). This section will argue that there is a linkage between U3A and the tradition of liberal learning for adults, and in Korea a linkage between the SU and the social status of learning as a means to social mobility, and the Confucianist tradition.

7.5.1 U3A in the UK

The evidence from the three U3As visited shows implementations of the U3A principles based on liberal adult education. That is:

- Democratic rather than authoritarian, with learners having the right to choose their way of studying, and having a direct influence on the determination of the subjects available to study;
- Non-utilitarian: non-vocational learning that is concerned with the education of individuals as well-educated citizens, and the development of learners' critical faculties (cf. Fieldhouse, 1985).

Richard Ross (1992) argues the following for liberal education:

- No evaluation.
- Independent: courses intended for individual learners, not organisations. Determination of curriculum without government control.
- Non-vocational (vocational is opposed to liberal, although learners may benefit from liberal education for vocational purposes).

An opposition to 'vocational' education was explicitly expressed by several of the U3A representatives. The importance of independence and 'self-help' was clear in the responses of the U3A representatives, even to the point that the U3As chose to belong to the national U3A movement (via the Third Age Trust) only so long as there was practical value to it (e.g. insurance cover, availability of useful resources) and a shared vision.

7.5.2 SU in Korea

As an extension of Korea's adult lifelong learning system, and the final stage of education, SU is generally recognised by people as the educational institution for older people. As the evidence presented above shows, the SU is patterned after the traditional school system in terms of management, class format and curriculum design. There are two principle reasons for this. Firstly, because Koreans give importance to formal education regarding, it as a powerful channel for social mobility. Secondly, because of the deeply-rooted Confucian thinking about students and teachers that is part of Korean culture.

Conventionally, Korea has a social system that is patterned after both old Korean, and adopted Buddhist and Confucian, traditions which allow for limited social mobility and the maintenance of social divisions by a centralised government (Choi, E., 2007).

However as the Yi Dynasty was coming to an end, around 1900, King Go-Jong enacted the Gabo Reform of social class in 1894. Thereafter, education became the most powerful means for social mobility in Korean society. The Korean hunger for education became even more intense after liberation from Japanese occupation in 1945, and after the Korean Civil War. Korea has actively invested in education, since it has been considered the primary driving force for national development and nation-building during the past half-century.

Young (1998) argues that Korea has strongly preferred the acquisition of schooling, diplomas and certificates that lead to future careers. Kim Shin-Il (2009, p. 124) argues for the negative consequences of this attitude - that Korea has diploma or *credentialism* disease (Kim, S., 2009). Confucianism has had an enormous impact on every aspect of the formalisation and how it is valued by Koreans. One of the significant themes for adult training and education is patriotism and loyalty to the state and the ability to establish horizontal or vertical relationships with others. Confucianism is so embedded in Korean society that it

is impossible to detach the importance of lifelong education and the value of Confucianism per se, even in the wealthy, modern Korean society (Merriam, 2007).

We can see this at work in the three characteristic of pedagogical orientation of the SU. First, the structured management; second, the formal differentiation of teacher and student roles; third, the fixed curriculum with compulsory subjects.

Inside the tradition of Confucianism, the role of a teacher is crucial. Teachers are regarded as rulers and authority figures in schools. This concept comes from a word 'goon-sa-bu ilchae (君師父一體)' which means that a king's, a father's and a teacher's roles are the same as rulers of society. By tradition, Korean students are taught not to step on a shadow of their teacher because even their shadows are regarded as venerable. Nowadays, such beliefs are declining among the younger generation but the older generation, currently in the SU, clings strongly to the traditional regard for teachers. One study showed that Korean older adults prefer for university professors to be their lecturers (Na, H., 2004, p. 202). This means that older people tend to think they can learn only from people with authority in terms of education. This also explains why SU members in this study stated that listening to lectures was the most pleasurable activity.

7.6 SUMMARY

This chapter has focused on two aspects: one is the exploration of institutional management and the other one is the review of approaches to learning and teaching. The management styles of the two institutions can be clearly differentiated. U3A in UK is patterned after an 'andragogical model' consistent with the bottom-up style of management where there are various choices of curriculum and where teacher- student relationship is horizontal, while the SU follows a 'pedagogical model' patterned after the traditional school orientation with an authoritarian style of management,a rigid curriculum,and the teacher-student relationship as vertical.

It has beeen argued that the SU has a 'top-down' style while U3A has a 'bottom-up' approach. As discussed, top-down management means that headquarters delegate tasks and disseminate information to the local, while bottom-up management is the practice of independence by local branches without putting much reliance upon its headquarters.

U3A adopts an andragogical model for teaching and learning, connected to the tradition of adult liberal education, having no assessment, non-vocational programme and independent curriculum. SU in contrast exhibits a pedagogical model, having a school-format style. These differences reflect strong social differences about attitudes and values towards learning and teaching. Two reasons why the formal school format is preferred in the informal learning field in Korea are: first, because education is very much regarded as a tool for social mobilization in Korea and second, because Confucianism, which is deeply ingrained in Korean culture, gives importance to the rigidly contrasting roles of teachers and students. Table 7-12 shows a summary comparison of institutional characteristics in terms of management and teaching and learning between U3A and SU.

Table 7-12 Summary Comparison of Institutional Characteristics

	U3A –UK	SU-KOREA
Model	**Andragogical model**	**Pedagogical model**
	- Bottom-up management (Democratic)	- Top-down management (Hierarchical)
	- Flexible role of teacher-student (Horizontal)	- Fixed role of teacher-student (Vertical)
	- Buffet or cafeteria style of subject selection (Subject-based)	- Course meal or set-menu style of subject selection (Course-based)
Culture	**Liberal adult education**	**Confucianism**

CHAPTER EIGHT: PARTICIPANTS' LEARNING EXPERIENCES IN THE TWO INSTITUTIONS

8.1 INTRODUCTION

The data analysed in the preceding chapter focused on the aspects of institutional management and the approach to teaching and learning as represented by each of the two institutions- U3A and SU. The current chapter analyses the research data to identify the differences and similarities in the learning experiences of the older people. With this aim, it also seeks to explain the cultural meanings of the learning experiences of older people in the U3A in the UK and SU in Korea.

The learning experiences analysed include: attitude towards learning and ageing, reasons for participation or non-participation, how the respondents obtain information about the courses and learning programmes, subject preferences, and activities that help promote learning. In recent years questions about the motivating factors for enrollment by older people in learning programmes have become increasingly important. If the reasons why older learners participate in education are recognised, then educational programmes can better address the needs of current and future older learners. This study's findings suggest that the preferences of participants in programmes could vary according to older people's background and culture. Based on the fieldwork in six local organisations – three U3A and three SU - an analysis and profiling of the social characteristics of participants is carried out, followed by identification of motivating factors.

The data analysed here comprises 216 questionnaires, 116 collected from U3A sites, and 100 from SU sites (see Chapter Three for details of data collection).

8.2 SOCIO-DEMOGRAPHIC BACKGROUND[24]

Socio-demographic factors are known to be important to explain the phenomena in relation to ageing and learning of older people (Han, J., 2005, p. 32). These include socio-demographic status as measured by occupation, education, income or other indices of social class, as well as gender and age.

In this study, a majority of the respondents were female (UK: 88 percent, Korea: 74 percent), as shown in Table 8-1. This raised a gender issue. This observation is similar to previous studies on gender differences in older people's participation in adult learning. Midwinter (1996) pointed out that in the United Kingdom just over three quarters of the membership of U3As was female. As already discussed in Chapter Two in the section on critical gerontology, Williamson (2000, p. 52-3)

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[24] Statistics about the living status of older people in the UK and in South Korea: according to UK official statistics (ONS, 2010), the majority of older British people owned their own households in 2007 but the percentage of owner-occupied households dropped with age, from 79 per cent for people aged 50-64 to 63 per cent for those aged 85 and over. Older women are more likely than men to live alone – and the number increases with age. In 2008, couples who were entitled to pension received an average income of £564 per week. In 2009, single men received a pension worth £304 whereas single women got £264. The state's 'benefit income' was the biggest source of income for pensioners and occupational pensions were an important source of income for couples. Among people aged 45-64 and 65-74 coping with obesity increased by 10 per cent to 30 per cent between 1995 and 2007. In addition, 30 per cent of people aged 75 over said that they suffer from a long-term illness, and this percentage remained constant from 1995 to 2007 (ONS, 2010).

In 2008, the percentage of elderly aged 65 and over in Korea living in households of two, three, or four generations decreased from 60.1% in 1985 to 27.6% in 2008. In contrast, the percentage of people aged 60 and over living alone increased from 4.3% in 1981 to 19.7% in 2008. Those living only with a spouse increased from 26.8% in 1994 to 47.1% in the same year. The earnings from savings or property, pensions, and public support have increased in the past 15 years. Since the National Pension system started paying pensions from 2008, the average proportion of income from pension increased from 2.9 per cent in 1994 to 26.4 per cent in 2008. However older Koreans still mostly depend on support from their children. The percentage of income from children is similar, from 74.5 per cent in 1994 to 78.3 per cent in 2008. With regard to the health concerns of older people aged 65 and over, the percentage of respondents who reported that their health is good decreased from 34.8 per cent in 1994 to 26.2 per cent in 2008. The most common health problems among older people are arthritis, high-blood pressure, and backache (Lee, Y., 2010).

addresses three reasons to explain the gender imbalance in his research[25]. The strongest reason was that women have longer life expectancy than men, so women in old age are more numerous and more likely to be in a state of good health in order to participate in learning institutions. The second reason was related to the earlier retirement of women, and that women more easily cope with retirement than men. Interestingly, his third reason was that because men tend to remarry more than women, so men feel the need of social involvement less than women. (Or perhaps men find other ways of socialising - the chairperson of WF U3A commented that "men would prefer to go to the pub instead of joining learning activities"). He also found in his research that some of the women had a motivation to join U3A in order to make up for lost educational opportunities (p. 56).

This phenomenon was not peculiar to the U3A, as gender imbalance was also observed in the case of SUs in Korea. Therefore, the result of this study supports the argument that gender differences exist in older people's participation in adult learning. This phenomenon has been termed 'feminisation'. As Sharf and Wenger (2000) argue, the effect can be amplified because older men sometimes don't want to participate in older people's organisations which they perceive to be dominated by women.

When the age of the respondents was categorised, the age range of U3A participation age was wider than that of SU, from below 50 to over 90. As discussed in section 7.3.1, members with ages under 50 were found in U3As, while in Korea, people under 60 years old can not join SUs (both culturally and legally, 'seniors' are 60 years or older).

A big contrast was observed in response to the question concerning whether the respondents lived alone or not. More than half of the U3A respondents lived alone, whereas a majority of SU respondents lived with spouse or partner, or with their

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[25] He surveyed the members of one U3A in New South Wales in Australia through a combined method of postal survey with a follow-up interview.

children or with relatives. Traditionally in Korea, children did not allow their parents to live by themselves when they became old. Instead, they supported them with good food and clothes until the end of their lives. This tradition of the children supporting and living with their elderly parents still remains, although with some changes in line with modern trends. Lee (2010) records that in 2008, the percentage of elderly aged 65 and over in Korea who served as the head of the household of two, three, and four generations decreased from 60 percent in 1985 to 27.6 percent in 2008. In contrast, the percentage of people aged 60 and over living alone increased from 4.3 per cent in 1981 to 19.7 percent in 2008. Within this changing scenario, elderly people no longer have the same authority and status in family life and are gradually becoming less directly dependent upon their children for support. The increase in single families of aged persons reflects this change; this is expected to increase to more than 30 percent by the year 2030.

The educational level of U3A respondents was higher than that of SU respondents; this level was strongly related to their current or past occupations. Whereas many professionals were inclined to join U3A, people who identified themselves as 'housewives' were the most common members in SU. Therefore, it could be expected that the level of education in U3A was higher because it was composed of more members who were professionals, which could share knowledge and skills from their respective fields – according to the self-help principle of U3A. On the contrary, ordinary SU members in Korea are less educated and more likely to separate themselves from the teacher professional. Regarding the educational level of participants, the result of this membership survey was consistent with the result of the representative survey, which was discussed in Chapter Seven. The representatives of U3As and SUs reported that the educational level of U3A members ranged from average to very high while that of SU members ranged from low to average. For the category of job, responses were left as an open-ended question ("What is /was your job?"), so the response categories were different in the two countries. The general classification of occupations was expected to be different: In the UK, a teacher or a civil servant could be categorised as professional, while in Korea such jobs would not be

identified as professional. In the UK, many U3A members came from a professional background. In order of frequency: teachers, secretaries, and administrators were found to be plentiful. Most SU participants were housewives without any other declared occupation. The interpretation of this is that that their main responsibility in their lives had been family and domestic work. Teachers comprised the second highest number of members followed by 'salaried employees' third.

The financial status of the members of the U3A was 33% 'high' and 'above average' compared to 18 per cent for SU members. On the other hand, members of U3A with a below average reported income were 16 percent and SU members 6 percent. Therefore the range of financial income of U3A members was wider than that of SU members. The high portion of U3A members reporting a financial level above average is supported by the data from representatives' reported in Chapter Seven: the financial level of U3A members ranged from average to very high, while that of SU members ranged from very low to average. There was one interesting point in the responses of members about their financial status. Even though overall, the typical financial level of U3A members was higher than for SUs, the percentage of below average responses of U3A members was higher than for SUs. I think that the 'central tendency' of Koreans could have influenced this response. Culturally, in Korea, on the matter of financial or social status, there is a tendency that people will respond that they are in the middle income/ social level.

As for health conditions, 87 percent of U3A respondents reported that they were fairly well whereas the figure for SU members was only about 40 percent. Cases of chronic illnesses were about 10 percent in U3A but more than 30 percent in SU. Thus, overall, the reported health condition of participants of U3A was better than that of the participants from SU.

Table 8-1 Socio-demographic Backgrounds of U3A/SU Respondents

	UK			KOREA		
	Item	Per cent (%)	Frequency	Item	Percent (%)	Frequency
Gender	Male	12	7	Male	25	21
	Female	88	53	Female	75	62
	Total	100	60	Total	100	83
Age	Below 50	2	1	Below 50		
	61~65	14	7	61~65	9	6
	66~70	12	6	66~70	25	16
	71~75	24	12	71~75	45	29
	76~80	20	10	76~80	17	11
	80~90	22	11	80~90	5	3
	Over 90	4	2	Over 90		
	Total	100	49	Total	100	65
Home situation	Alone	65	39	Alone	23	16
	Accompanied	35	21	Accompanied	77	55
	Total	100	60	Total	100	71
Level of education	No formal education	2	1	Primary	39	32
	Primary education			Middle school	20	17
	Secondary education	32	19	High school	28	23
	College /university	63	37	College /university	10	8
	Other	3	2	Other	4	3
	Total	100	59	Total	100	83
Job	Professionals	44	24	Housewife	35	15
	Teacher	27	15	Education /teacher	19	8
	Secretary	15	8	Salaried employee	16	7
	Administrator	7	4	Business	14	6
	Civil servant	4	2	Civil servant	9	4
	Housewife	2	1	Manual labour	2	1
	Shopkeeper	2	1	Nurse	2	1
				Semi-manual	2	1
	Total		55	Total		43
Financial status	High	5	3	High	5	4
	Above average	28	16	Above average	13	11
	Average	51	29	Average	76	64
	Below average	16	9	Below average	6	5
	Total	100	57	Total	100	84

Health condition						
Health condition	Very good	37	22	Very good	5	4
	Fairly well	50	30	Fairly well	36	30
	Do not feel well but nothing in particular	3	2	Do not feel well but nothing in particular	27	22
	Sometimes ill	5	3	Sometimes ill	22	18
	Chronically ill	5	3	Chronically ill	11	9
	Total	100	60	Total	100	83

In looking at the profiles of older people in the two organisations, we should be careful to categorise them into supposedly uniform groups. There were major variations among the respondents according to gender, social class, ethnicity, and other variables. As people age, there are arguably more rather than fewer distinctions among individuals and subgroups (Han, J., 2006, p. 43). Hence, it is more accurate to speak of the heterogeneity of older people and it may be misleading to continue to use the label 'older adults' without qualification of its usage: "[O]lder adulthood is as much a social construction as it is a physiological one. As a consequence, there are myths which have been built around purported capabilities of older adults and societies' expectations for what they can and should do." (Findsen, 2005, p. 51)

Fry (1992) also argues that we must recognize differences in older adults based on gender, economic and racial issues. An understanding of both cultural and economic contexts is necessary to make sense of the phenomena of ageing society in different countries.

Carlton and Soulsby (1999, p. 10) state that society needs to create wider participation in more and better learning opportunities for older adults who have not benefited previously from learning, or who have been excluded due to race and social class. Swindell and Thompson (1995) argue that those who participate in learning predominantly have white and middle class backgrounds. These older people have financial resources for tuition fees and have good health. Carlton and Soulsby (1999) urge policy makers to prepare various kinds of programmes which older people can access easily.

8.3 REASONS FOR PARTICIPATION AND BENEFITS FROM U3A/SU

In this section, questions about reasons for participation or non-participation and benefits from participation are considered in terms of Cross' Points C and E as well as Cross' 4 types of barriers. Originally this question asked the participants to choose 3 main reasons as to why one would participate in learning at U3A/SU and they were asked to rate their answers, 1 being the strongest and 3 being the weakest. As seen in Figure 8-1, many participants chose three reasons without rating their answers. Therefore, only the frequency of responses has been used. In the UK, the most frequent response was 'because I like learning' (29 percent), followed by 'because it seems interesting' (20 percent), 'to make friends' (19 percent), 'to develop myself' (14 percent), 'to keep healthy' (9 percent), 'to get out of the house' (5 percent), 'to be confident' (2 percent) and 'for something to do' (1 percent).

In Korea, 'to keep healthy' (25 percent) was the most frequent response, followed by 'to develop myself' (20 percent), 'to kill the time' (16 percent), 'because it seems interesting' (13 percent), 'to be confident' (8 percent), 'to make friends' (8 percent), 'because I like learning' (7 percent), 'to get out of the house' (1 percent), 'because my family wanted me to' (1 percent) and 'for something to do' (0.4 percent).

Responses to the question regarding the reasons to join the institution showed differences between U3A and SU. In the UK, the most frequent responses were 'Because I like learning' and 'Because it seems interesting' while in Korea it was 'To keep healthy'. It is said that U3A members focus more on learning itself and SU members tend to join because of the health benefit. As seen in Table 8-2, more than half the respondents (54/110) mentioned 'health' as the main benefit. This reflects a national-cultural trend in Korea to encourage living healthy and well-being, and using learning as an instrument for health improvement.
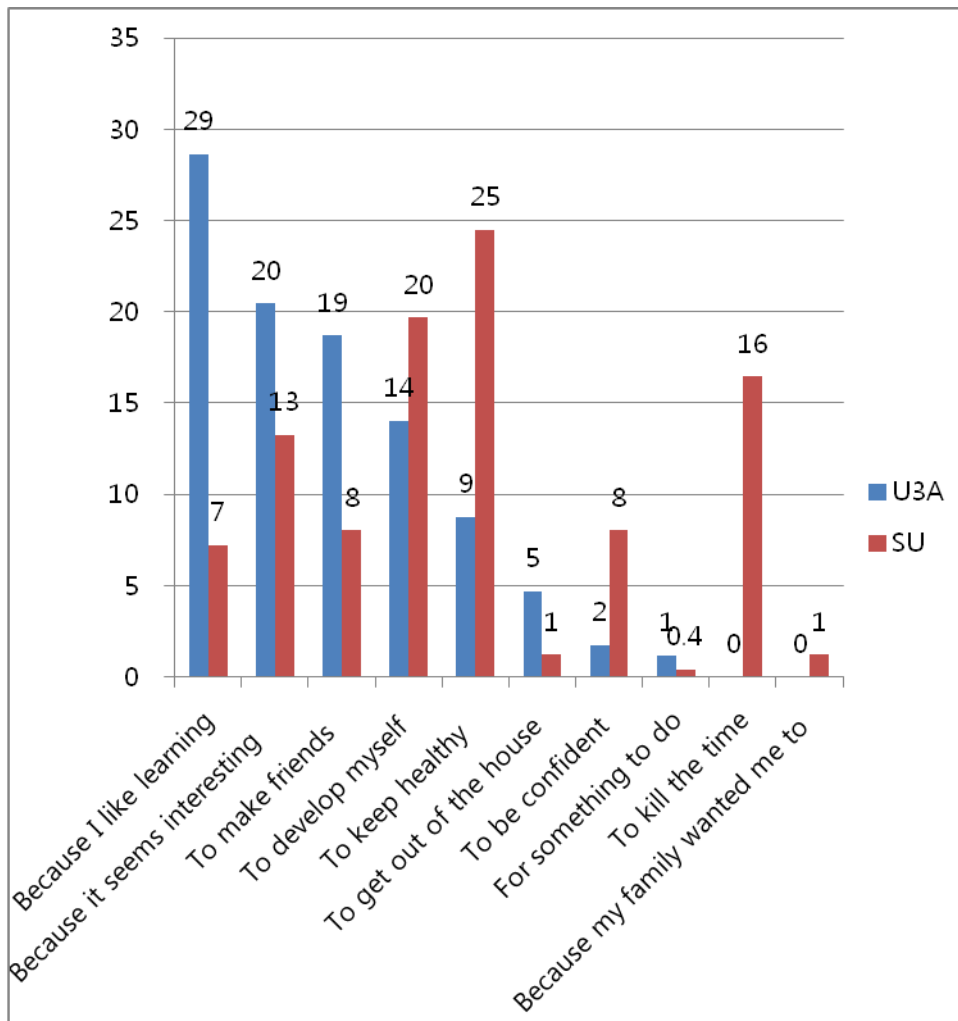
Figure 8-1 Reasons to Participate in Learning in U3A/SU

(Percentages of Respondents choosing that item)

In the questionnaire, the participants were free to write down the benefits they gained from participation in U3A/SU. The responses were categorised into similar groups and then counted, as shown in Table 8-2. In the UK, members mentioned friendship (meeting people) first, which was followed by mind/brain active, knowledge/skill gain, developing interests, meeting like-minded people, health, self-development, pleasure/enjoyment, communication, confidence, enthusiasm, experience, more rounded life, and getting out of the house. In Korea, half of the respondents (54/110) mentioned 'health', and then in sequence, friendship, happy mind, confidence, something to do regularly, gaining knowledge, keeping young,

pleasure/enjoyment, self-development, communication, adaptation to life, and prevention of dementia.

Regarding the benefits of participation, in the UK, members mentioned friendship (meeting people) most frequently. Considering that the percentage of those living alone was more than those who were accompanied in the UK, the social function of U3A seems important. In contrast, it is usual for Korean people to gather together to spend time. Every village has a place called 'Kyungro-dang' where older people spend time together doing many things. So it would be expected that for Koreans friendship is not the main aspect of joining SU.

Table 8-2 The Benefits from Participation in U3A/SU (Open)

UK Item	Response Frequency	KOREA Item	Response Frequency
Friendship	29	Health	54
Mind/brain active	17	Friendship	18
Knowledge/skill gain	13	Happy mind	12
Developing interest	9	Confidence	10
Meeting like-minded people	4	Something to do regularly	4
Health	3	Gaining Knowledge	4
Self-development	3	Keeping young	2
Pleasure/enjoyment	3	Pleasure/enjoyment	2
Communication	2	Self-development	1
Confidence	1	Communication	1
Enthusiastic	1	Adaptation to life	1
Experience	1	Prevention of dementia	1
More rounded life	1		
Out of the house	1		
Total	88	Total	110

In this study, I was not in a position to conduct surveys of non-participants and it was a reasonable supposition that participants would have some insights into why older people do not participate, based on their experience and contacts with other older people in their communities. Bariso (2008) analysed the factors influencing participation in adult education in the context of urban England, including the WF area which is one of the areas in this study. He argues that the "learning divide

among different group and learning opportunities is socially distributed in particular ways, thereby reproducing already existing forms of inequality" (p. 123).

The participants were asked to choose 3 possible reasons for why older people might not want to participate in learning at U3A/SU and were asked to rate their answers in the boxes, 1 being the strongest and 3 being the weakest. Many participants only chose three reasons without rating their answers, so in the analysis only the frequencies of responses have been used. As represented in Table 8-3, the participants in the UK tended to think that people did not participate in U3A due to these reasons: 'because of health' (17 percent), 'not interested' (16 percent), 'too tired' (10 percent), 'not enough time' (9 per cent) and 'no need to learn anymore' (9 per cent). The participants in Korea, on the other hand, mentioned these two common reasons: 'because of health' (19 percent) and 'because of taking care of (grand) children' (19 percent). This reflects the situation that in Korea many older people are still taking care of their grandchildren. In the UK, other reasons were: 'apathy', 'prefer to watch TV all day long', 'because of transport difficulties or no car', 'fear of failure', 'not aware of what is available'. Interestingly, a respondent said, "Not knowing what it would be like and fearful they are not 'clever' (which does not matter). The word 'university' puts people off."

Table 8-3 Reason not to Participate in U3A/SU

(Suggested by participants for older people's non-participation in U3A/SU)

UK			KOREA		
Item (Q12-ALL)	Per cent (%)	Frequency	Item	Per cent (%)	Frequency
Because of health	**17**	28	Because of taking care of (grand) children	**19**	42
Not interested	**16**	27	Because of health	**19**	42
Too tired	**10**	17	Not enough time	**15**	34
Not enough time	9	14	Not interested	8	18
No need to learn anymore	9	14	Too old	6	14
Afraid of being together with strangers	7	11	Too tired	5	12
Because of taking care of (grand) children	6	10	Difficult to follow course	5	11
Too far	5	9	Afraid of being together with strangers	5	10
Too expensive	4	7	Too far	4	9
Too old	4	7	Nothing interesting	4	8
No need for qualification	4	6	Too expensive	2	5
Nothing interesting	2	4	Difficult to take time from work	2	5
Difficult to read and write	2	3	No need for qualification	1	3
Afraid of going out of house	2	3	Difficult to read and write	1	2
Difficult to follow course	1	2	No need to learn anymore	1	2
Difficult to take time from work			Afraid of going out of house	0.4	1
Because family doesn't want it			Because family doesn't want it	0.4	1
Others	1.22	2	Others	1	2
Total	100	164	Total	100	221

When participants were asked about their willingness to continue with their membership in U3A/SU, most respondents showed willingness, as seen in Figure 8-2. In U3A about 75 percent were positive and in SU 100 percent of respondents were positive.
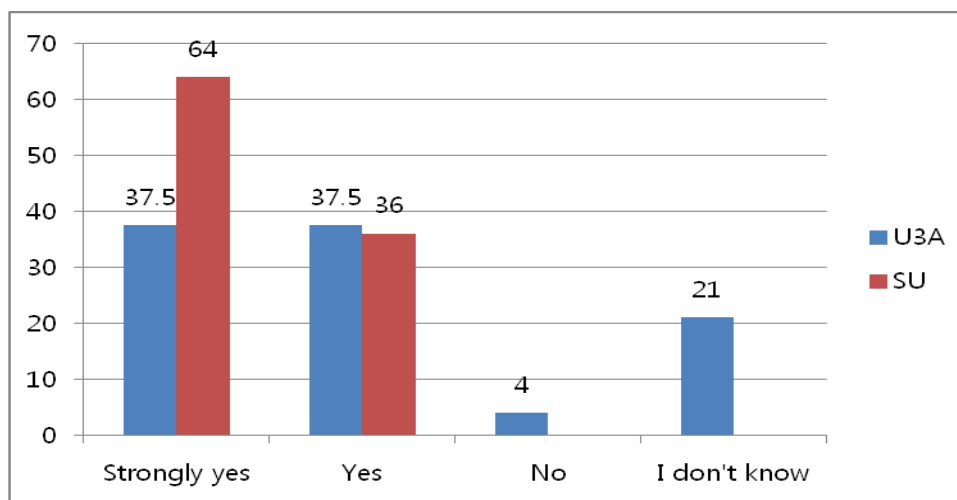
Figure 8-2 Willingness to Continue their Membership at U3A/SU
(Percentages of Respondents choosing that item)

8.4 ATTITUDE TOWARDS AGEING AND LEARNING

The questions examining the attitude towards learning are related to Point B of Cross' COR model. The researcher also examined the attitude towards ageing as it is an important factor which influences the participation in learning. First, the responses of the participants to the definition of 'being old' were categorised into two: 'by age' and 'not by age', as shown in Figure 8-3. In the UK, the definition of being old 'not by age' was 62 percent and 'by age' was 38 percent. In Korea also, the definition 'not by age' (57 percent) was still higher than 'by age' (43 percent).
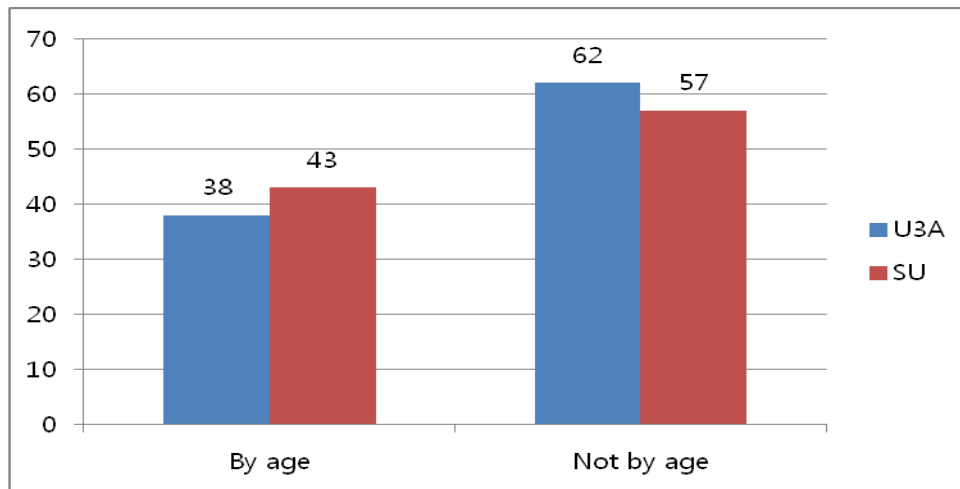
Figure 8-3 Perception of Being Old

(Percentages)

Second, most of the respondents in this study regarded 'being old' as over 80 years old (U3A 41 percent, SU 56 percent), as shown in Table 8-4. The respondents rarely considered people under 70 years old as 'old'.

Table 8-4 who is Old by Age

UK				KOREA		
Over 60		0	By age	Over 60	4	1
Over 65	5	1		Over 65	4	1
Over 70	27	6		Over 70	15	4
Over 75	14	3		Over 75	11	3
Over 80	**41**	9		**Over 80**	**56**	15
Over 85	14	3		Over 85	11	3
Total	100	22		Total	100	27

Third, the responses in the 'not by age' category were put into sub-categories, as shown in Table 8-5. In the UK, people tended to regard those who were 'not interested in anything' (42 percent) as the oldest , followed by 'mind inactive' (17 percent), 'older than themselves' (11 percent), 'physically ill' (11 percent), 'nothing to do' (8 percent) and 'outlook' (3 percent). In Korea, 53 percent of

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responses were: 'mentally inactive people', followed by 'physically ill' (21 percent), 'nothing to do' (16 percent) and 'outlook' (5 per cent).

Table 8-5 Perceptions of People who are Old 'Not by Age'

UK	Per cent (%)	Frequency	KOREA	Per cent (%)	Frequency
Mind inactive	17	6	Mind/mentality inactive	53	20
Not interested	42	15	Nothing to do	16	6
Nothing to do	8	3	Physically ill	21	8
Older than myself	11	4	Outlook	5	2
Physically	11	4	Others	5	2
Outlook	3	1			
Others	8	3			
Total	100	36		100	38

In most cases, respondents in this study tended not to think of themselves as being old (U3A, 71 percent; SU, 67 percent). Taking into consideration the average age of the respondents in this study (U3A, 75 years old; SU, 72 years old), relatively more members of U3A tended to think of themselves as younger than those of SU. The respondents who said that they think of themselves as being old were inquired about the reason. The responses were divided into two categories: age and body ageing. Those who said they were old in U3A because of age were 67 percent, and 50 per cent in SU.

8.5 MEMBERSHIP OF U3A/SU AND OTHER ORGANISATIONS

Participants of U3A were likely to remain a member relatively longer than participants of SU. In U3A, 38 percent of the members had belonged for between one and five years whereas in the SU, 78 percent had been members for the same duration. In U3A, 15 percent of the members had stayed for more than 15 years, whereas there was only one person who had been a participant for more than 15 years in SU.

As can be seen from Table 8-6, about half of the participants from U3A (57 percent) had experienced joining other courses during the last three years whereas most of the SU participants (88 percent) experienced participating in other institutions apart from SU. Even though it is not an open question, options between the two countries were different according to the feasible learning provisions for older people. About 43 percent of the respondents of U3A used the services of an adult education centre, and the next most common provider was a further education college. The other responses were, in sequence: library, private institutions, religious organisation, at home, voluntary organisation and county council. Apart from the pre-specified options, respondents mentioned that they used to go to art and craft fairs, Age Concern computer courses, local retirement groups, London Philharmonic [orchestra], National Portrait Gallery and university summer school. In the case of SU, the most common other institution that participants used to go to was the Welfare Centre (59 percent). The others, in sequence were: senior community hall (11 percent), citizen self-governed centre (8 percent), and local Lifelong learning hall (6 percent), at home, Lifelong education centre in University, library, private institution, primary and secondary school and religious organisation. Apart from the pre-specified options, respondents mentioned that they had attended a culture centre, museum, swimming pool, other senior university, and broadcasting companies.

Table 8-6 Other Courses Participants Joined in the Last Three Years

UK			KOREA		
Item	Per cent (%)	Frequency	Item	Per cent (%)	Frequency
Adult Education Centre	43	20	Welfare centre	60	68
Further Education College	13	6	Senior Community Hall	11	13
Others	11	5	Citizen Self-governed Centre	8	9
Library	9	4	Local lifelong learning hall	6	7
Private institutions	8	4	At home	4	4
Religious organization	6	3	Lifelong Education Centre in University	4	4
At home	4	2	Library	4	4
Voluntary Organization	4	2	Private institutions	2	2
County Council	2	1	Others	2	2
Primary, secondary school			Primary, secondary school	1	1
Day centre			Religious organization	1	1
Total	100	47	Total	100	115

In terms of Cross' Point F, participants were asked where they got information about each institution and the educational opportunities. One of the options was expressed differently between the two countries, as shown in Table 8-7. In the UK, there was an option of 'from the library', but for the Korean version this option was replaced by 'husband or wife' because in Korea it was rare for older people to gather information from the library. Both versions allowed participants to state other sources not given in the specified options. In both countries, participants mostly got to know U3A/SU through friends (U3A 50 percent, Korea 59 percent). In the UK, learning about the U3A by newspaper (11 percent) or from the library (11 percent) were the next most frequent. In Korea, people acquired the knowledge about the SU by, in sequence: by friend, by neighbour, by children, by placards/posters, by chance, in the newspaper, and by husband or wife.

Table 8-7 Information Source about U3A/SU

UK			KOREA		
Item	Percent (%)	Frequency	Item	Percent (%)	Frequency
By friends	50	32	By friends	59	54
Others	16	10	By neighbours	15	14
In the newspaper	11	7	By children	9	8
From the library	11	7	By placards /posters	9	8
By chance	6	4	By chance	3	3
By neighbours	5	3	In the newspaper	2	2
By placards/posters	2	1	Others(Welfare Center, TV etc.)	2	2
By children			By husband or wife	1	1
Total	100	64	Total	100	92

8.6 SUBJECTS AND ACTIVITIES

Out of all their subjects, when asked which they liked the most out of those they had taken so far, as seen in Table 8-8, participants of U3A selected the following (arranged by frequency): Russian, Literature, Opera, Local History, Architecture, Art, History, London Walks, Music, Play Reading, Books, Crafts, Current Affairs, Embroidery, English History, European History, French, Italian, Language, Medical Topics, Modern World, Science, Short Mat Bowls, Singing, Victorian Literature and Walking. SU participants mentioned Sports Dance, Singing, Exercise, Dancing, Yoga, Cultural Education, Health Management, Social meeting, Current events and Philosophy. Sports dance was the most frequently mentioned, 32 times out of 101, in Korea and singing 22 times, exercise 16 and dancing 13 (see Table 8-8).

Table 8-8 Most Preferred Subjects Taken So Far

UK	Frequency	Korea	Frequency
Russian	4	Sports Dance	32
Literature	3	Singing	22
Opera	3	Exercise	16
Local history	3	Dancing	13
Architecture	2	Yoga	7
Art	2	Cultural Education	5
History	2	Health Management	3
London walks	2	Social meeting	1
Music	2	Current events	1
Play reading	2	Philosophy	1
Books	1		
Crafts	1		
Current affairs	1		
Embroidery	1		
English history	1		
European history	1		
French	1		
Italian	1		
Language	1		
Medical topics	1		
Modern world	1		
Science	1		
Short mat bowls	1		
Singing	1		
Victorian Literature	1		
Walking	1		
Total	**41**	Total	**101**

As represented by Figure 8-4, to the question about which type of learning programme was the most appropriate for older people, the most frequent response was 'leisure and hobby programmes' in both countries (56 percent of respondent from U3A and 76 percent of participants from SU) . The second most frequent option was 'general and academic courses.' In the UK, 13 percent (8/64) chose vocational or skills acquisition but no one chose this option in Korea.
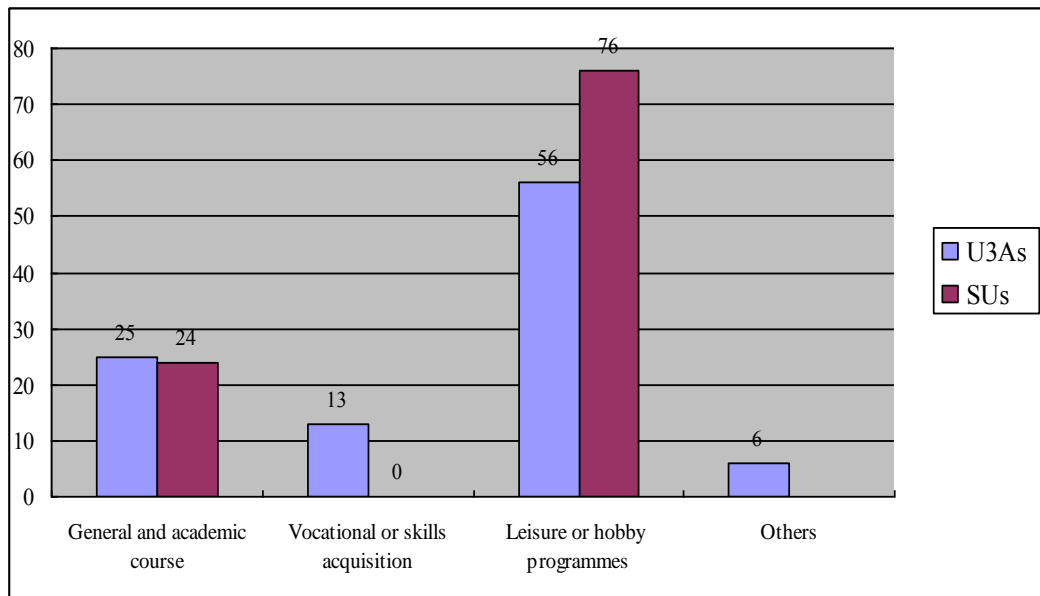
Figure 8-4 Type of Learning Programme the Respondent Considers Appropriate for Older People

(Percentages of Respondents choosing that item)

The preferences for types of learning activity can be seen in Figure 8-5. In the UK, the responses in sequence were: 'joining in discussions' (31 percent), 'involvement in activities' (23 percent), 'practising skills' (23 percent) and 'listening to lecture' (20 percent). In Korea, the responses were stated in sequence: 'listening to lecture' (48 percent), 'involvement in activities' (47 percent) and 'joining in discussions' (4 percent). Respondent from U3A mostly preferred 'joining in discussions' while respondents from SU mostly preferred 'Involvement in activities.' Of course, the British model of U3A started from small discussion group style and still most subjects are taught in that way. However, in Korea, people are not accustomed to conducting discussion in educational settings, so that lectures are the most common type of formal learning. (In Korean culture, discussion was not seen as a good attitude of students because students only could receive knowledge from the teacher who had absolute authority in knowledge about that subject.)
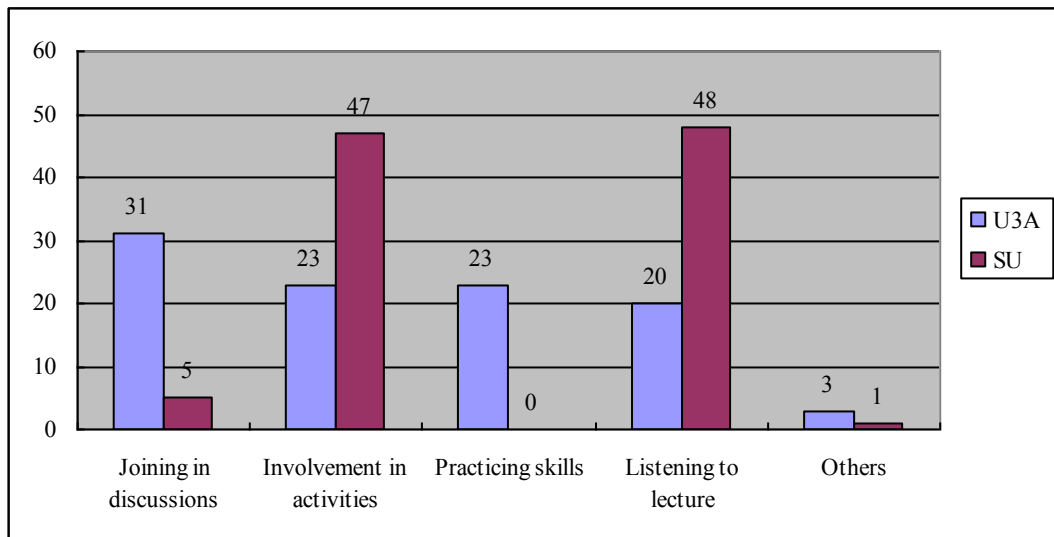
Figure 8-5 Type of Learning Activities Most Preferred by Members

(Percentages of Respondents choosing that item)

To determine the most common activities pursued by the older people during their leisure time, respondents from both countries were asked to choose one option from the questionnaire. However, during the course of the fieldwork, respondents found it difficult to choose only one, so they were allowed to choose more than one option. As seen in Figure 8-6, in the UK, 'reading the newspapers, magazines, books and so on' (46 percent) was the most frequent, followed by 'listening to the radio, watching TV and so on' (25 percent) and last was 'doing activities' (14 percent). By contrast, the most frequent response in Korea was 'listening to the radio, watching TV and so on' (44 percent), which was followed by 'doing activities' (28 percent) and 'reading the newspapers, magazines, books and so on' (14 percent).
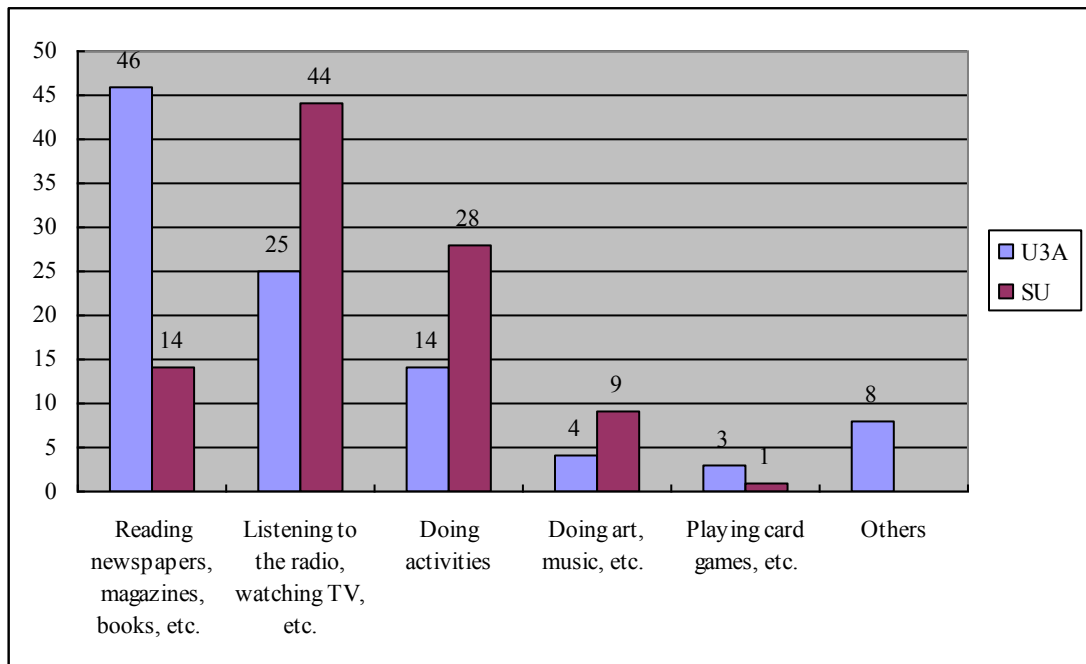
Figure 8-6 Most Common Activities Pursued by Older People during Leisure Time

(Percentage of Respondents choosing that item)

8.7 CULTURAL MEANING OF SIMILARITIES AND DIFFERENCES

In this chapter, the learning experiences of participants from U3A in the UK and SU in Korea were examined. The learning experiences include: their attitudes towards ageing and learning of older people, their perception of the benefits from learning, reasons for participation and non-participation, how they obtained information on the courses and learning programmes, and their preferred subjects and learning activities.

Some important patterns of similarity and difference can be identified. The majority of the respondent members from both institutions were female. There was a significant difference in the responses to the question about whether the respondents lived alone or not. More than half of the respondents at U3A lived alone, whereas the majority of the respondents from SU lived either with a partner,

or with their relatives or children. Many members of U3A have professional or 'white collar' backgrounds, such as teachers and administrators, while most of the participants in SU described themselves simply as housewives. In accord with this, the educational level of U3A respondents was generally higher than SU. In U3A the 'professional' attitude of sharing skills or knowledge, without a distinction between member and teacher, is an important working principle. In SU in Korea, there is a distinction between regular members and lecturers or teachers. When it comes to health conditions, the self-report suggested that the participants in U3A were broadly healthier than in SU. Moreover, the financial stability of U3A participants came out better than those of SU.

It could be summarised that U3A members typically join because of a passion for learning, while SU members participate to keep themselves healthy. This reflects a cultural practice as well as national advocacy in Korea to promote health and well being among citizens. Respondents from the UK stated that the social functions – meeting people and creating friendships – are among the top benefits from participation in the U3A.

The most preferred subjects mentioned by the participants in U3A were humanities-related, such as Russian, opera, literature and local history, while sports dance and exercise were among the most frequently mentioned in Korea. This difference between U3A and SU can be attributed in part to the basic approach to the formation of learning groups'. In U3A, members can volunteer to share their knowledge and create study groups that share the same interests. However, in Korea, the authorities from the institutions decide the subjects and arrange the schedules.

The differences between the responses of U3A and SU subjects are also strongly related to their attitudes towards learning. In the UK, members reported that learning at U3A was considered informal but in Korea, learning at SU was considered formal. Formal learning is generally depicted as a form of schooling which consists of teacher, student, and a fixed venue for studying. The term group

leader or tutor is used at U3A while the terms teacher, student, and dean are used at SU. Moreover, members of U3A generally gather at a member's house; whereas members of SU meet at a public meeting place.

Based on the results above which show the main differences between U3As and SUs, it can be concluded that U3A has a more academic learning orientation than SUs and the 'academic model' of the U3A learning approach is well explained by means of the tradition of non-vocational and liberal education, as discussed in Chapter Six and Seven. Of course, there is variation among U3A branches. For example, WF U3A has a more social aspect than academic learning because the educational background of members in this U3A was relatively lower than in the other U3A branches. However, comparatively, U3As generally have a more academic orientation than SUs in Korea. U3A in the UK can be explained as reflecting middle class culture. In the case of SU in Korea, learning activities and subjects are more centred on leisure and hobbies rather than academic interests and SU can be explained in terms of 'Botong-saram' or 'ordinary person' culture.

In clarification of the terms that refer to class or social position of people, it should be noted that the middle class refers to the people that belong in the middle of social hierarchy. There is a difference between the meaning of middle class in the UK and in Korea. In the UK, the people who are neither part of the working class nor the upper class of the society are considered the middle class. Generally, people who have a good education, own a family house, and hold professional posts are regarded as members of the middle class. However, in Korea, many families with blue-collar jobs consider themselves as middle class while they would be considered working class in the UK.

'Botong-saram' means the 'ordinary person'. Compared to the middle class culture of U3A in the UK, Korean SU has the 'ordinary people culture'. Ordinary people live a normal life and they are not considered as special or different in any way. In this sense, it could be said that ordinary person belongs to the middle class in Korea.

8.7.1 U3A in the UK

Since most of the U3A's members have completed a higher education, they can easily gain access to U3A, obtain information about the learning opportunities available in the library, enjoy academic subjects, and easily share their knowledge and skills through the method of mutual aid, and usage of self-help learning style. Findsen (2005) criticised the U3A movement as being dominated by the middle-class and white people.

> *Wearing a sociological hat, it is possible for me to critique this educational movement for its white, middle-class bias···The membership of U3A is heavily represented by professionals and business people who generally have higher levels of educational attainment than the norm. The exclusion of minority groups is obviously not deliberate but the pervading ethos of the institution mirrors the values of the dominant group in society (Findsen, 2005, p. 92).*

The appropriation of self-help movements by a section of the middle class is an repeating phenomenon, as previously discussed. Providing an historical perspective on self-help in the nineteenth century Britain, Harrison (1988) noted that self-help movements were seen by some reformers as providing only limited potential for improving the situation of the so called disadvantaged, since only a minority were, in practice, able to respond to the opportunities.

As mentioned by Findsen (2005, p.92), people having previous experiences in education are more likely to participate in educational opportunities in their later life.   This means that most of the participants from the U3As are those who have acquired a higher educational level; are able to perform self-help; and exchange mutual help with other older people. In U3A, the learning strategy is closely similar to self-directed learning. Self-directed learning (SDL) is an approach to adult education in which learners are expected to take personal responsibility in the management of their own learning process. SDL is based on autonomous individuals who are independent enough to choose their own learning methods

that are appropriate for their learning capabilities.

8.7.2 SU in Korea

Due to their educational backgrounds, the majority of SU members do not have confidence for doing SDL or engaging in self-help, unlike U3A members. As mentioned above, many female members of SU have been working in the home and they see themselves as devoted housewives. Those of the main member group of SUs, aged more than 65, lived their childhood in the economically deprived situation after Korean War and in particular, women had little or no access to formal education. Therefore, it is not surprising that SU members prefer fixed learning programnes that do not need to be tailored to every member's needs. In general, the educated elderly are more likely to choose to be lecturers or speakers because most of them believe that institutions such as SU are for people from the lower socio-demographic levels that are seeking further welfare. Thus, educated males are more likely to be involved with SU institutions as speakers or lecturers.

Interestingly, one school in Korea, the University of Kyungbook, runs a learning programme for older learners called 'Honorary University', free of charge. The number of enrolled aged 50 years old and above range from 200 to 250 annually. Like regular students, honorary university students (predominantly educated males) are allowed to enrol in three courses and will be given graduate certificates once they finish a total of 30 credits. However, the range of subjects is limited.

8.8 SUMMARY

This chapter discussed the results of the survey administered to the members of U3A in the UK and members of SU in Korea. There were 26 questions outlined in the questionnaires, nine of which aimed to determine the socio-demographic background of the respondents. A total of eight socio-demographic background variables were analysed; age, gender, level of education, financial status, leisure activities, occupation, living arrangement (alone or accompanied) and health

condition. This survey questions focused on the learning preferences of the subjects and their reasons for joining U3A or SU.

The learning model used by U3A is more academic than for SU. This finding is based on the participants' responses about their preferred subjects and learning methods, benefits from participation, reasons for participation, and an analysis of their socio-demographic backgrounds. Cultural differences can also be used to explain the differences in the models that are adopted. UK's U3A can be explained as a reflection of middle class culture, while SU is a reflection of ordinary people's culture. Table 8-5 shows a summary comparison of learning characteristics between U3A and SU.

Table 8-9 Learning Characteristics Summary: U3A and SU

	U3A –UK	**SU-KOREA**
Model	**Academic model**	**Non-academic model**
	- Discussion preferred (Actively participating)	-Lecture preferred (Passively listening)
	-Academic subjects provided (Philosophy, psychology, history etc.)	-More leisure activity focused (Dancing and singing)
	-Higher economic and educational level of participants	-Lower economic and educational level of participants
Culture	**Middle-class culture**	**Ordinary person culture**

Findsen (2005) criticised the U3A as being dominated by middle-class and white people. Indeed, it has been middle class people, often with academic backgrounds, who, have initiated and supported the development of U3A. The spirit of self-help and self dependence characterises learning in U3A. U3A participants preferred academic subjects, and typically had confidence in self-directed learning methods. On the contrary, SU in Korea is recognised as a place for ordinary people (Botongsaram) where they can go and enjoy a range of activities. SU in KOPA is considered as a leisure place rather than a learning or educational institution, both

by elderly people and by the terms of the Elderly Welfare Law. SU members preferred hobby-related subjects' more than academic courses and were more comfortable with a teacher-student learning environment.

CHAPTER NINE: CONCLUSIONS

9.1 INTRODUCTION

This thesis started from a concern with two contradictions. The first was the contradiction between the development of increasing discussion on lifelong learning for older people in an ageing society, and the lack of learning opportunities actually available for older people. The second was a contradiction between governmental policies and older people's learning needs. While governments argue the necessity of a lifelong learning system for solving societal problems, it is observed that there are movements by older people themselves to expand their learning opportunities, based on their expressed needs and only partially aligned with societal or governmental concerns. The thesis has examined these contradictions in the two countries, South Korea and the UK, and two national movements of older people, the SU and U3A.

With reference to the first contradiction, even though the ideal concept of lifelong education includes learning of older people, it is argued that the actual learning provisions have little focus on older people. National learning policies have been focussed on two things: the emergence of a knowledge-based economy and the economic implication of the ageing society. From the knowledge-based economy perspective, policy initiatives in many countries have tended to focus on 'economically active' groups, namely young adults and the unemployed for training and vocational purposes. From the perspective of the ageing society, it seems that the key policy concern is to reduce old age dependency from an economic point of view.

Despite governmental inattention towards the general education of older people, different learning initiatives have developed in the non-statutory sector, particularly to provide non-credit education for older people. This study chose U3A in the UK and SU in Korea as representative learning institutions of this type, where older people could learn to meet their educational needs. This study aimed

to characterise learning institutions for older people through a country-to-country comparison in order to explain cultural differences, and to recommend ways to enhance the learning experience of older people in Korea.

Chapter One of this thesis defined 'culture' as the enduring sets of beliefs, values, attitude, and ideologies that underpin the structures, processes, and practices that distinguish the third-age learning organisations in each country.

To compare the nature of learning institutions between the two countries, a questionnaire was used to obtain data from organisers and members of U3A in the UK and SU in Korea, in addition to interviews and documentary analysis. To conduct a comprehensive comparative analysis, this paper used the multi-faceted approach of Bray and Thomas (1995) whereby this study investigated the four cubes such that each cube corresponds to a research question: the development of the institutions; the management of the institutions; the teaching and learning patterns of the institutions; and the experiences of participants. The differences and similarities of each cube are examined and explained by cultural differences between the two countries.

The aim of this final chapter is to present the conclusion of the findings and arguments drawn from this multilayered, comparative research study. First, this chapter summarises the main arguments developed in the previous chapters and outlines the main empirical findings resulting from the fieldwork. Second, discussions and suggestions for the development of learning of older people in Korea are identified. Third, future research points are suggested for further development. Table 9-1 summarises the comparison of the learning characteristics of U3A and SU.

Table 9-1 Summary of Comparison of Learning Characteristics of Two Institutions

		U3A –UK	SU-KOREA
Historical Development	Model	Mutual-aid or Self-help model	Organisation-led welfare model (Politically-connected model)
	Culture	Economic liberalism	Military government
Institutional Characteristics	Model	Andragogical model (Informal-education model)	Pedagogical model (Formal-education model)
		- Bottom-up management (Democratic)	- Top-down management (Hierarchical)
		- Flexible role of teacher-student (Horizontal)	- Fixed role of teacher-student (Vertical)
		- Buffet or cafeteria style of subject selection (Subject-based)	- Course meal or set-menu style of subject selection (Course-based)
	Culture	Liberal adult education	Confucianism
Participants Experiences	Model	Academic model	Non-academic model
		- Discussion preferred (Actively participating)	-Lecture preferred (Passively listening)
		-Academic subjects provided (Philosophy, psychology, history etc.)	-More leisure activity focused (Dancing and singing)
		-Higher economic and educational level of participants	-Lower economic and educational level of participants
	Culture	Middle-class culture	Ordinary person culture

9.2 MAIN ARGUMENTS AND FINDINGS

In this section, firstly, I discuss three characteristics of learning policies for older people in the two countries as observed in Chapter Five. Then, secondly, I will outline the main arguments and findings from the fieldwork as given in chapters Six to Eight. Finally, I will discuss the methodological and theoretical significance of this study.

The learning of older people draws its justification when seen through the perspectives of lifelong learning and the learning society. From the vertical point of view, learning of older people is included in these concepts and from the horizontal point of view, informal or non-formal learning, which most older people prefer, are integrated into the concept of lifelong learning. In discussions of the learning society, that is the emerging knowledge and information needs of a fast changing society, the learning of older people is seen as necessary to cope with social changes. Through a comparison of the learning policies for older people in Chapter Five, I observed three specific characteristics. First, current policies are vocational in character; this area is particularly focused-on in the UK. So far as vocational relevance is concerned, current policies view education as a means to occupational advancement. Much of the thinking about qualifications, particularly with the growing emphasis on employability and vocationalism, views them in terms of their relevance for obtaining work and, quite often, for doing work. This emphasis has come to play an important role in our understanding of education in general, which increasingly is viewed in terms of its role in helping individuals to obtain a favorable place in the labour market. This perspective on the role of education is likely to be much less relevant to older people, since the emphasis on employability and vocationalism is not fully representative of their aspirations in later life. The reasons for which older people undertake education may be much more to do with their own interests and education is not primarily perceived as an investment which pays economic returns.

Second, and more relevant to the case of Korea, is the issue that current policies are related to expanding schooling for young people rather than including older people. This could be interpreted as another expression of the vocational rationale. It is apparent that the youth labour market for school leavers has largely disappeared, and entrance to universities has become a prerequisite for young people's preparation for future employment. Therefore, the Korean government is expanding the available ways of obtaining university degrees through flexible modes, in particular through 'cyber universities' based on the internet (Han, S., 2008).

Even non-vocational education is perceived for its instrumental purpose, focusing on its contribution to broader social aims. Adult and community-based learning is regarded as a key government effort to enable participation in learning, enhance community confidence and capacity, and promote good citizenship. Public policies cater to needs of particular groups, and thus focus on issues such as crime prevention or housing, enabling adults to gain confidence in learning and acquiring skills. Education therefore plays a significant role in community capacity building as a means to deal with social problems. Again, there is very little emphasis on education as a way to meet individual needs; it is instead viewed in terms of its community function and subordinated to the attempt to achieve social goals. Social policies are usually designed and implemented to remediate social problems. It was in the 1970s that a set of features associated with ageing began to be perceived as a 'social problem' in Korea.' In the UK, the ageing phenomenon became focused as a social issue earlier than in Korea, during the 1950s, according to Laslett (1996).

With regards to learning policies, I therefore conclude that the rationale for these policies in a learning society is predominantly economic, conceptualized on the human capital model of a learning society. It is apparent that the notion of a learning society justifies the inclusion of older people, and learning opportunities should be available to every citizen without exception, including older people, and should be present in all areas of society from school and college, to the home, the

community and the workplace. Nevertheless, it is noticable that there is a tendency for the marginalisation of older people in a learning society because so much attention is paid to employment and vocational training of the younger generation. In this respect there is a evidently a gap between the ideal and what happens in practice.

I will now outline the main arguments from Chapter Six to Chapter Eight. In Chapter Six, the current status and the historical development of the U3A in the UK and SU in Korea were examined and similarities and differences between the two institutions were explained by tracing their respective cultural backgrounds. Three main differences were drawn out: U3A is only setup for learning but SU is a sub-division of KOPA which is an organisation for the development of the rights of older people; U3A seeks to be an independent and self-help organisation but SU would like to obtain more support from the government; and regarding the development of local branches of U3A, this was achieved through local people who agreed to the philosophy of the U3A movement whereas KOPA expanded to a large extent in the late 1970s thtough a merging of SUs setup by other people or other organisations and by establishing its own SUs.

From the perspective of historical development, the two institutions have a common basis in that they started because of the lack of governmental policies for learning of older people. However, regarding the relationship between the government and each institution there is a big contrast between the two institutions. The British model of U3A has, from the beginning, been independent from the government. It started as a social movement for the learning of older people and adopted a 'self-help model'. The SU rather can be described as a 'politically connected model' - Even though the running body is a non-governmental organization, the word 'politically connected' implies funding and support from the governmental as the national welfare system grows. In Korea, it has been the welfare movement which increased learning opportunities for older people.

As discussed in Chapter Six, in the UK, the start of U3A was based on the decrease of national welfare from the late 1970s. The UK is famous as one of the western countries which established a national welfare system very early - following the Beveridge Report in 1942, and implemented in the late 1940s. However, with economic crisis in the 1970s, in 1979 the Conservative government of Margaret Thatcher started changing its policy on the welfare system within a framework of neo-liberalism and so from the 1980s onwards self-help movements flourished. U3A, developed to replace the government's decreased educational provision for older people. .

In the case of South Korea, still in the 1960s, after Japan's colonisation and the Korean War, the economic development was the first goal in the whole society and welfare for the older people was outside governmental attention. KOPA was formed as part of a social movement for elderly welfare in Korea. Since then, KOPA has tried to gain more support from the government and SU started as one of the business branches of KOPA from 1981. The existences of social organizations such as KOPA which have to depend on the state were attributed to the strict control of the government on the operation of educational organisations. At the height of the military power in Korea, in the 1970s and 1980s, the government forbade the promotion of social and liberal organisation providing informal and non-formal learning. To enlarge its scope of business KOPA was required to use political networks.

The self-help nature of U3A and the politically-connected characteristics of SU are understood also by the relationship between local branches and the head-quarters of each institution: the U3A is 'horizontal' and the SU is 'vertical'. As observed through Chapter Seven, the headquarters of the U3A, the Third Age Trust, does not exercise any control over local groups and encourages local branches to share their experiences and resources. The Third Age Trust does run a resource centre and issues a magazine. A local representative committee manages each U3A group democratically. Each SU has a running committee, however it is controlled by a KOPA committee and the local KOPA is controlled by the central

KOPA committee. SUs of KOPA conform to KOPA regulations; they are financially supported by KOPA and operate in a KOPA building.

As for the relationship between the institutions and their participants, U3A's style can be described as 'bottom-up' and SU's as 'top-down'. In the bottom-up style, groups of interested older learners define their learning protocol and appoint one or more of themselves to lead their studies. The top-down style is defined as an educational programme for older people designed by institution staff, with courses, lectures and workshops taught by regular or adjunct teachers.

The U3A style of bottom-up management is illuminated by the origins of liberalism which are dialectical and democratic (Fieldhouse, 1985). In nature, U3A is self-help. As educational programmes are run by the elderly themselves who participate actively in the design and planning of the activities. U3A shows an obvious departure from the school education tradition. Each U3A is a coalition of members who make all the decisions (Formosa, 2010). Most of the U3As are initiated by older people in their locality. They are self-sufficient and self-directed. The U3A has triumphed in third-age clientele interest which is growing because it has reduced many barriers which previously hindered older learners from participating in later life education (Midwinter, 2005). There are neither awards nor exams nor entry requirements to overshadow the excitement and vigour of sharing of ideas among the participants. This common sense basis of older people learning, regardless of members' educational backgrounds, has gained a worldwide acceptance according to Swindell and Thompson (1995).

Regarding subjects and activities, a metaphor for the UK model is 'buffet or cafeteria style' whereas the Korean model could be called 'set-menu'. In a buffet or cafeteria customers can choose what they want to eat and pay only for what they eat, and because there is no set menu, customers select a mixture of things they like. By contrast, with a set-menu customers cannot choose their own combination of foods and the set-menu price has to be paid even though customers might not want some of the food provided. U3A is subject-based,

which means that members choose the classes they want to join, whereas SU is course-based in which learners enroll in a particular course which consists of several subjects and once you enter the course, you have to follow the curriculum of that course without selection. Therefore, the range of subjects available through U3A is relatively large, from humanities subjects such as philosophy, psychology, literature and so on to hobbies or craft-based activities according to an individual's interest. In the case of SU, subjects of the course generally can be summarised into dance, singing, exercise and lectures. The lectures focus mainly on 'health matters'. In each institution the reasons to join and the benefits from learning were broadly similar between the two countries, but the major reason found for joining U3A is that people like learning whereas for the SU it is to maintain a healthy life.

As for the relationship between teacher and students, this study examined the interchangeability of the role of teacher-student. If the role is interchangeable, the concept of teacher-student will be more similar to tutor-participant. Jarvis (1985) puts this in another way, for instance, in a pedagogical approach the learner is dependent whereas in an andragogical approach the learner moves towards independence. In andragogy, students are self-directing, and teachers encourage and nurture this movement whereas in pedagogy, the teacher directs what, when and how a subject is learned. Therefore, in this study, a situation having a fixed curriculum and fixed role of teacher–student was defined as a pedagogical model whereas a situation with a selectable curriculum and changeable role of teacher– student was defined as an andragogical model. The terms 'andragogy' and 'pedagogy' were adopted to label the characteristics of learning and teaching observed in the two institutions. I do not adopt here all the aspects of the andragogical model; as discussed in Chapter Two, there are criticisms of a too generalised and descriptive model of andragogy (Reischmann, 2003).

The SU operates as an adult learning extension of schooling. It is patterned after the conventional education system in terms of curriculum design, class format and management. There is a tendency that each SU will follow a formal learning

system managed by the head quarter of the institution, thus relying upon the pedagogical learning model. Two reasons were identified as to why the pattern of conventional learning is preferred. First, Korea attaches more importance to formal education as a powerful means for social and economic development. Second, being tied to Confucianism there is an attachment to the formal, structured relationship between teacher and student; and having nationally determined school curriculum is a dominant idea. As discussed in Chapter Seven, Confucianism has greatly influenced the educational system of Korea. Confucianism is deeply concerned with the integration of all human life aspects, especially when it comes to education, civil administration and ceremonies. Confucianism is a part of the Korean society and is still manifested in the values held even by the new generation of Koreans. Thus, Confucianism and the traditional lifelong educational system in Korea are inseparable (Merriam, 2007).

Based on the members' responses regarding reasons for participation, benefits, preferred subjects and learning methods, and attitudes towards learning and ageing as well as socio-demographic backgrounds, it has been shown that U3A is characterised by a more 'academic' model of learning than for SU, based on self-directed pursuit of academic subjects and discussion. These models can be explained as arising from cultural differences. U3A is a reflection of middle class culture and SU in Korea is explained with 'ordinary person' (Botongsaram) culture. Even though SUs in Korea follow the pedagogical model and attempt to shape learning in a formal education style, paradoxically its members are 'ordinary people' who seek non-academic and hobby-centred subjects like dancing and singing in the name of learning and education. As there is a fixed role as a student, they tend to be dependent on teachers for what they learn rather than to be actively involved in the learning process.

Considering their educational and occupational backgrounds, as examined in Chapter Eight, the dependent characteristics of the members in SU are easily understood. Most of the members of SU are female who did not have other jobs except 'being a housewife' in their lives. The outer format of SU has a formal

educational institution style but the inner content consists of ordinary people who often do not have enough educational confidence for dealing with academic subjects, or for participating in discussions or sharing their knowledge or skills as is typical for students of U3A. I identified U3A with middle-class culture because member's educational, occupational and financial statuses are higher than that of SU members. First of all, in terms of socio-demographic status, the U3A membership ranges from average to very high whereas the SU membership ranges from very low to average. Even though this is not the case for all members, some members of U3A are well-resourced enough to invite (5 to 15) people to their house as places for learning.

Secondly, most members of U3A come from professional backgrounds, although (like SU) most members are female. The educational level of the U3A membership ranges from average to very high while SU ranges from low to average. In most instances within the U3A, group leaders are retired academics, teachers or professionals. In Korea, retired academics or teachers tend to be speakers rather than members. In SU there is the concept of teacher and students, not members, and therefore retired professionals would want to be a teacher in SU rather than a student. In contrast, U3A members could share their knowledge and skills as tutors or group leaders at one point while at another point playing the role of student in other classes. Tilda (1999, p. 261) argues that the link between learning in later life and previous educational experience is related to the different impacts of socio-economic forces on cohorts differentiated by age, social class and gender. The Chain-of-Response (COR) model by Cross (1981), adopted for this study, was useful in understanding the psychological and sociological factors that impact older people's participation in learning.

2013 PIAAC (Programme for the International Assessment of Adult Competencies) study findings showed the large increase in the educational competency level among young adults and large gap between the literacy level of young adults and older adults in Korea, contrasting this with England where older adults' competency level was shown to be relatively high when compared with

younger generation and compared with Korean older people (OECD, 2013) (see Figure 9-1).

International average : 273

Korea

Young Koreans outperform older Koreans by a large margin (293 vs 244)

England/Northern Ireland (UK)

Young and older adults in England/Northern Ireland (UK) perform similarly (266 vs 265)

240 245 250 255 260 265 270 275 280 285 290 295 300

Score

● 55-65 year-olds ■ 16-24 year-olds
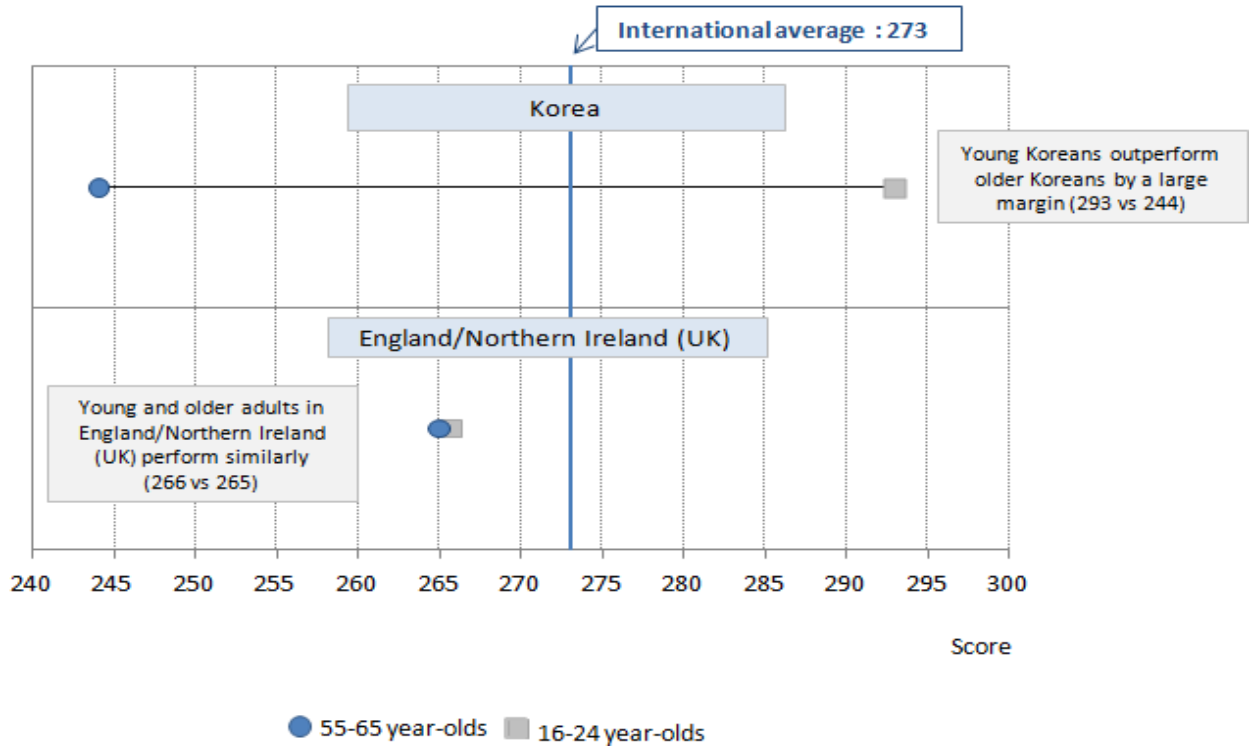
Figure 9-1 Literacy Skill Gap between Older and Younger Generations in Korea and in England/Northern Ireland (UK) (from OECD, 2013, p. 31)

In the UK, libraries are one of the most important public places which older people use to get information. Libraries in the UK are used by people of all ages and backgrounds and they have deep historical roots (Smith, 1997). To the contrary, in Korea libraries are typically not frequented by older people. Therefore, the members of U3A reported getting information about U3A from libraries but members of SU did not mention libraries as a place to get information. This suggests a need to consider the role of public libraries for older people in Korea. I will discuss this more in the section 9.3.

Regarding the reasons to join institutions, there were differences in the responses for U3A and SU. The responses showed U3A members as learning oriented and SU learners as more instrumentally motivated. In the UK, the most frequent

response was 'because I like learning' and 'because it seems interesting' while in Korea it was 'to keep healthy'. SU respondents' focus on health benefit as a reason to join was also supported by the responses to the question related to the benefits of joining the institution: more than 50 per cent of respondents (54/110) mentioned 'health' as the most important benefit. It is a national-cultural trend in Korea to encourage healthy living and well-being. And it is apparent from the data that older people regard learning as an instrumental method to make them do something for their health.

Regarding the gender imbalance as discussed in Chapter Eight, feminisation is a visible phenomenon in both organisations. However, there is a difference between the two. In the UK, not only the membership comprises mostly women, the management committee is also predominantly female; while in Korea, executive members tend to be male and most of the members are female. In Korean culture, there is an expectation that educated and professional males will tend to be the leaders in a social group or organisation, rather than women; this is an attitude which is related to Confucianism. For younger people, this type of attitude is changing and the number of women leaders is increasing. However, the current membership of SUs are from a generation that still holds to values and norms based on Confucianism, and so it is not unexpected to find that older people have preferences for male leaders. To increase male participation in learning groups like U3As and SUs, it is possible that having courses and alternative activities specifically targeted to a particular gender might help to increase membership. Even though this study did not focus on why men do not join U3A or SU, one of the reasons might be that the courses offered are generally not interesting to men. The efficacy of developing gender-specific courses in order to recruiting more male members could be tested in a future study.

While self-help learning is also related to individualism in the western culture, learning in Korea is related to collectivism. In western culture, individual choice and sharing is encouraged while in Korea, following and obedience to authority is encouraged. Individualism means a society in which ties between individuals are

loose. On the other hand, collectivism stands for a society in which people are integrated into groups and they are expected to follow groups' values and expectations. Cultures can be therefore divided into two categories: collectivist and individualist. Individualist cultures emphasize personal achievement while collectivist cultures emphasize group goals. China, Korea, and Japan are recognized as collectivist cultures while United States and Western Europe have individualist cultures.

Generally speaking, people in individualist cultures are prone to loneliness and people in collectivist cultures can have a fear of rejection (Sawir, et al., 2007). In the UK, self-help movements like U3A provide a welcomed chance in which people meet like-minded people, and make friends while reducing the prospect of loneliness in the long run. Regarding the benefits of participation, in the UK, members mentioned friendship (meeting people) most frequently. Considering that in the UK, the percentage of people living alone is greater than those who are accompanied, the social function of U3A is clearly important.

Culturally, Korean people like to gather together to spend time. In the case of older people, there is a place called 'Kyungro-dang' in villages where older people spend time simply doing things together. Many older people spend time here and have lunch together. It is open to all elderly people without any restrictions.

This cross-cultural study may help academics and policy makers to understand the learning phenomena of older people and also to understand how these learning phenomena are shaped by different cultural and economic contexts. An understanding of both is necessary for an ageing society. This is especially important at a time when public policy reviews indicate a growing realisation that access to learning opportunities may also offer wider non-economic benefits (UNESCO, 2010).

This study aims also to contribute to the development of various learning programme models according to the differences and cultures of third age learners.

Older people's approaches to and interests in learning are wider and more varied than those of the younger generation, because of their life experiences and backgrounds. No single model will address the diverse interests, abilities and access to learning options of all third-age people.

This study contributes to an understanding of the ways in which cultural and political context shape the learning of older people. In understanding context, Bereday's framework of comparative study has been significant in this research. According to Bereday (1964), the second step of 4 stages is interpretation and researchers should take into account a full range of factors that may influence the development that is under investigation: historical, political, economical, and social.

As stated in Chapter Two (section 2.2), Bereday's model is useful for three reasons. First, it highlights the importance of systematic and balanced inquiry. Second, it views educational experiences from a far-reaching perspective, and third, the model allows for a profound comparison by determining the scope and basis of the similarities and differences and the concomitant cultural meanings, as well as contributing to a conceptual understanding of the global changes and local continuities in adult education.

In addition to Bereday's model, the multi-level analysis advocated by Bray and Thomas (1995), provides a useful perspective to differentiate levels, ranging from personal to institutional to national, and to differentiate aspects of education like development, management, learning-teaching, and learning experience. The cubes generated through the three dimensions of analysis are like variables in a quantitative study.

In a globalizing world, the comparative study method is gaining in importance for social and educational research. As stated in section 1.7, a key significance of this study is underlined by the limited availability of existing comparative studies of educational gerontology, in particular between Western and Eastern countries.

This study makes an original contribution to the development of models of third age learners which take account of cultural differences through a systematic comparative approach.

Two social trends that promote the importance of learning for older people arise from, firstly discussions about lifelong learning in a 'learning society', and secondly concerns about older people in an 'ageing society'. The critical, comparative exploration of these phenomena also strengthens the development of educational gerontology as an emergent discipline (see Figure 9.2).
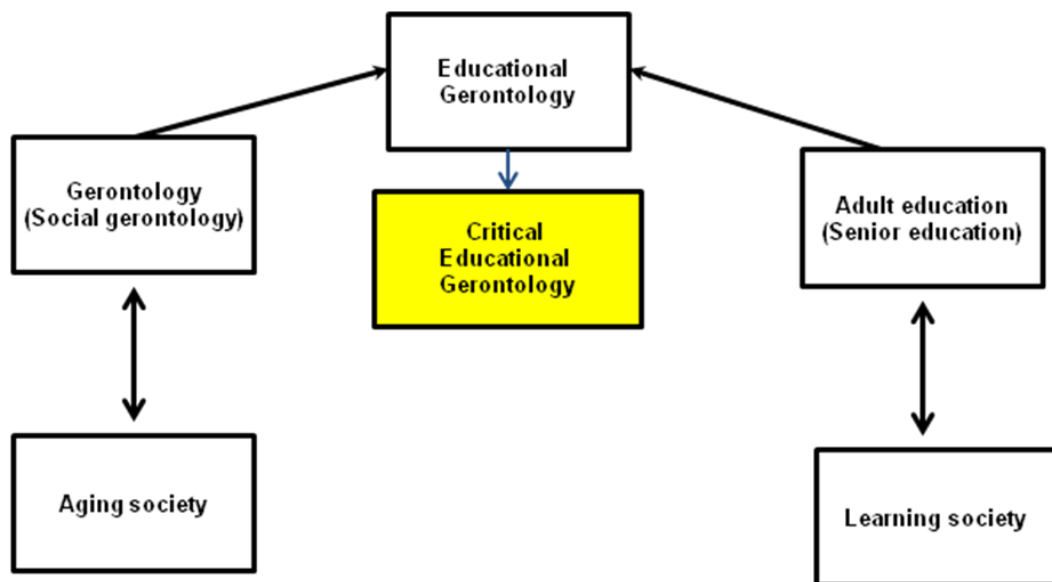
Figure 9-2 The Links between Learning Society, Ageing Society and (Educational) Gerontology

In Chapter Four, we observed that Third Agers are people who are still active and healthy after retirement, and that the concept of the life course is changing. In the past, older people have tended to be marginalised within society. Today, the learning of older people is very necessary for them to participate in society and to develop themselves as citizens for a variety reasons. Mezirow (1991) insists that learning is a basic right, and Elmore (1999) stresses the moral aspect of learning opportunities for older people in society. The Carnegie Inquiry into the Third Age reported that when we are older (and no longer caring for dependent children),

personal development can once again become a central concern (Schuller & Bostyn, 1992).

By taking part in meetings and setting up organisations of the third age, participants are declaring their interest in the future for this age group and the recognition of the value of their continuing learning. Groups like U3As and SUs are critical to enable older people to claim learning opportunities for themselves.

As the academic discipline 'educational gerontology' develops, there is a need to take a critical perspective, to develop what is called 'critical educational gerontology'. Glendenning and Battersby (1990) criticise the conventional field of educational gerontology because it has a more psychologically focused research orientation, which considers older people as a homogeneous group. Based on my observations of members' profiles in the two countries, it was clearly evident that older adults are not homogenous. According to Glendenning and Battersby (1990), there is a need to argue against the tendency to consider the elderly as one homogeneous group as if social class, gender, and ethnicity differences can be easily erased by participation in education. This study has both confirmed and moved beyond this by providing new evidence of the social and cultural dimensions of variation that have to be kept in view when the 'third age' is considered cross-nationally.

It was observed that the UK U3As are trying to expand virtual learning programmes through the use of the internet. This is a reflection of a changing society and recognising the changes in participants' learning needs as well. I suggest that once a self-help model of learning of older people like U3A can be established in Korea, then Korea also will move into developing on-line learning programmes for older people in their learning organisations. This can be understood as a phenomenon of global convergence of learning models but it is most likely that it will be adapted into the Korean cultural context (that is, a process of divergence), as observed in this study. This is analogous to the way that McDonalds, a fast-food restaurant company, has spread all over the world and the

terminology McDonalidization is understood as a phenomenon of homogenisation of cultures in a global society. In Korea, the number of fast-food restaurants like McDonalds is increasing, but the Korean version of restaurants, like Lotteria, are more popular than McDonalds.

The self-help learning model (andragogical model) of British U3A is converging with others around the world and this is to be welcomed in the ageing society. Considering that the emergence of third agers, and the increasing discussion of the andragogical learning model, was active in the UK earlier than Korea by several decades, I believe that U3A, and its self-help model, will be increasingly welcomed in the future in Korea. However, as found in this study, the cultural, socio-economic and political differences of Korea will be influential and reflected in the process of adoption to some extent, which is patterned on a process of 'crossvergence', combining elements of both convergence and divergence.

A critical issue for the self-help model in both countries is to increase the participation of less advantaged people in programmes such as U3A. The self-help approach tends to attract the more educated, and the development of online learning is also likely to exclude the least advantaged. In Korea, this is likely to be an area of convergence. Unlike in UK society, the Korean government still strengthens the welfare for older people and this potentially means that the least advantaged will be actively supported by the state to participate in learning, which would be a divergence from the UK situation. It is probable that the Korean government should focus most on the least advantaged people, with the welfare-state model, alongside promotion of self-help for the increasing numbers who are able to organise their own learning with less support and less intervention from the government.

9.3 SUGGESTIONS FOR THE DEVELOPMENT OF LEARNING OF OLDER PEOPLE IN KOREA

As stated in Introduction in Chapter One, one of the main objectives of this cross-cultural study was to suggest how to develop learning of older people in Korea, based on an understanding of the contextual and cultural differences involved.

As reviewed in Chapter Four, Korea has the youngest population among the OECD countries, but it is expected to undergo a rapid ageing process over the next few decades due to its economic development. Korea is likely to experience one of the most rapid demographic transitions from an ageing to an aged society. The process of ageing is so rapid there is not enough time for a society to prepare for the changes resulting from ageing. This gap between the speed of ageing and the preparation for that ageing society was named 'culture lag' by Ogburn, as long age as 1922.

In preparation for the aged-society in Korea, educational programmes for older people should be designed in ways that consider the specific social changes that affect older people in Korea. In traditional Korean society, older people hold a symbolic position and authority based on the ethic of filial piety, rooted in the Confucian tradition. Aged persons secured respect, and children had strong responsibilities to support their parents in later life. However, industralisation and urbanisation brought forth nuclear families, emphasising the values of independence. With the growing number of older people who live by themselves without children's support or co-living with families, the elderly need alternative venues to socialize with friends. Based on the research results, I suggest several points for the development of learning of older people in Korea. .

First, there should be a move towards a social climate in which older people are able to help themselves to achieve learning and education. As shown in the case of the U3A, older people have a great potential to share their knowledge and organise learning programmes themselves. As the number of educated people in

the elderly group increases, self-help learning becomes possible in Korea. Even though Korea is at the stage of establishing a welfare society, and considering the steep increase in the ageing population, there should be an atmosphere that older people can take their own steps to prepare for their later life. At the same time, the government should focus attention and resources more on the groups of older people who have difficulties in participating in learning activities or in organising learning activities themselves for various reasons: financial, physical or mental. Recently, campaigns for the self-help movement of older people have focused in the field of elderly welfare. For example, in the newspaper, Noinsidae (老人時代, Older People's Age), in May 2011, the emergence of the self-help clubs of older people was reported as follows:

> *Senior clubs which used to be dependent on welfare centres are changing into being 'creative' and 'independent' now. These positive changes dispel the image of dependent older people. The subjects of clubs are various: Sports dance, dance, drumming, etc. The people in those clubs communicate and participate in society through doing performance as well as learning. ... One senior club has the motto like "Let's learn! Let's enjoy! And let's share!" (11 May, 2011, from Noinsidae newspaper).*

The SU in Korea is based on a 'welfare model' and most facilities for elderly education in Korea have relied on governmental support. The representatives of local SUs surveyed in this study stated that they would like to obtain more financial support from the government. Increasing governmental budgets on educational institutions like SU is good in terms of increasing the quality of elderly education; however, it can tend to make older people dependent rather than self-reliant. It will be down to KOPA's decision if it will aim to provide programmes for marginalised older people in Korea with governmental financial support, and to foster a climate for self-guided learning.

In order to establish a self-help movement for the learning of older people, first of all there should be a consulting and support agency for older people. The National Centre for Lifelong Education was established in 2003 according to the Lifelong

Education Law and this was changed to 'the National Institute for Lifelong Education' in 2008. Even though this institute has focused up to now on lifelong education at the level of higher education, such as 'credit bank' and 'self-study bachelor degree programme', the institute could take a consulting role to promote a climate of learning among older people. One more specific strategy to develop a self-help climate in learning is to make it easier for older people to access public libraries for their information sharing and searching for learning opportunities in a locality. Since the initiation of the Lifelong Education Law, public libraries have been designated as facilities of lifelong learning and have been providing learning programmes for audiences including older people. In 2010, Jaecheon city established the Elderly Library, dedicated to use by older people.

As a pre-cursor to establishing a self-help climate in learning, there has to be a change in perspectives on the learning of older people. As discussed in Chapter Five, in Korean (as well as UK) society, we tend to categorise older people as a group with special needs, like prisoners. In terms of giving special attention to minority groups this categorisation can be understood to be based on concerns for welfare. However, it is important to understand that expanding learning opportunities for older people is not because older people have been marginalised and compensation for them should be offered, but because society requires a new paradigm of learning in general and in this context, learning for older people should be reconceived.

As discussed in Chapter Seven, Sunghee Han (2002b) proposes that the role of the state should be modified from 'delivering' knowledge through the state school system, to supporting and encouraging individuals in learning; to support them from being passive receivers to independent or active learners. Opportunities are magnified when education happens without teaching in a learning society. In a learning society, learners should be given options to learn at their own pace or convenience. Lifelong education should involve new ways of thinking that are different from the existing background of conventional school education. It is not just an extension of the educational patterns from children to adult, but a new

system in which educational concepts are re-conceived (Han, S., 2001, p.5). Therefore in the discussion of learning for older people, wider perspectives on learning should be made: formal and informal, instrumental and expressive, liberal and occupational, academic and social (see Figure 9-3).

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┌──────────────┐              ⎛          ┌──────────┐          ⎞              ┌──────────────┐
│              │              │          │  Formal  │          │              │              │
│              │              │          │    or    │          │              │              │
│              │              │          │ Informal │          │              │              │
│              │              │          └──────────┘          │              │              │
│              │              │       ┌─────────────┐          │              │              │
│              │              │       │ Instrumental│          │              │              │
│              │              │       │     or      │          │              │              │
│   Ageing     │──▶ ┌────────┐│       │  Expressive │  ┌────────┐──▶          │   Learning   │
│   Society    │    │ Older  ││       ┌─────────────┐  │ Older  │              │   Society    │
│              │    │ People ││       │  Education  │  │ People │              │              │
│              │    └────────┘│       │     or      │  └────────┘              │              │
│              │              │       │  Learning   │          │              │              │
│              │              │       ┌─────────────┐          │              │              │
│              │              │       │   Liberal   │          │              │              │
│              │              │       │     or      │          │              │              │
│              │              │       │  Skill/job  │          │              │              │
│              │              │       └─────────────┘          │              │              │
│              │              │       ┌─────────────┐          │              │              │
│              │              │       │  Academic   │          │              │              │
│              │              │       │     or      │          │              │              │
│              │              │       │   Social    │          │              │              │
└──────────────┘              ⎝       └─────────────┘          ⎠              └──────────────┘
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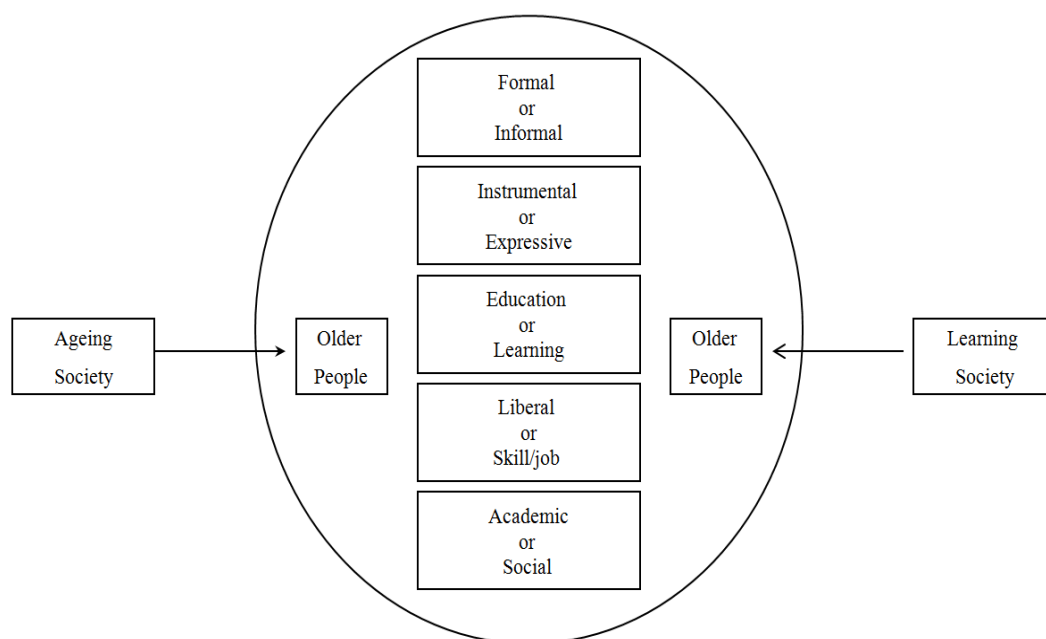
Figure 9-3 Taking a Wider Perspective on Learning Provision for Older People in the Two Countries

Another priority in Korea should be more opportunities for older people who do not have high educational backgrounds, or who cannot pay high fees for learning programmes. Except for the senior classes provided by welfare-related bodies like SU, there are not many different types of learning programmes for older people to participate in. Generally senior classes are open one day per week in each locality.

The most common style of senior classes is run by the SU and also by religious institutions in Korea. There are also some general voluntary organisations providing programmes for older people: YMCA, YWCA, Red Cross, etc. Generally, these institutions do not run long-term programmes for older people,

but short-term ones for the purposes of entertainment. In Korea, there is peculiar phenomenon of Hakwons which are private learning institutions for academic courses, arts, language, computing, baking, gardening, and various job-related skills and in principle older people could use them. However, because of high fees, older people typically do not use them for their hobby or leisure time. Some universities and colleges provide learning programme for older people through their lifelong learning centres. From the late 1990s, universities (in Korea, institutions providing four-year degree courses) and colleges (those offering only two-year courses) set up lifelong education centres and provided learning programmes equivalent to university-level academic subjects, which are liberal education, leisure-based courses, or skill-improvement courses. However older people tend not to participate in these programmes because they are relatively expensive.

As mentioned in Chapter Five, interestingly Kyungbuk National University runs an 'Honorary University' for older people, in which participation is free of charge. Subjects are limited according to the academic departments and professors. This is very similar to the French model of U3A. However, people who do not have high educational background or enough confidence to follow academic courses will find it difficult to participate in such courses.

The role and function of the two governmental authorities related to elderly education, MoEST and MoHW, should be made more clear for the development of elderly education. It is a serious problem that there is not a single authority responsible for the learning of older people. Within Senior Welfare law, senior leisure facilities are defined as those that are responsible for providing leisure programmes for older people, such as educational or learning activities, and programmes which satisfy the need to participate in social activities, to keep healthy, and to ensure income for the institution. This is a key reason why the learning of older people is considered as an aspect of welfare programmes, and thus learning programmes for older people are instrumentally-oriented rather than learning-oriented.

When I say that learning programmes for older people should be learning-oriented, I also highlight the importance of empowerment of older people. Sandra Cusack (2000) argues that the purpose of learning programmes for older people should be 'empowerment', which means reframing old notions of 'power over' to 'power to' and 'power with' approaches, and enabling seniors to play a greater role in setting the community-based research agenda, and shaping the policies and programmes that affect them.

Finally, I would like to discuss gender issues among older people. Through this study, we could understand that many SU members are women with lower educational and socio-demographic backgrounds (see Chapter Eight). The current main users of SUs, aged more than 65, lived their childhood in an economically deprived situation after the Korean War and in particular, the women in those times did not get access to formal education. Therefore, an educational needs assessment for older women should be conducted and considered while designing programmes, in which the variations due to socio-economic backgrounds also could also be examined.

As discussed in Chapter Eight, even though feminisation is the same phenomenon among members in the two organisations, there is a difference observed. In the UK, not only is the membership mostly women, the management committees also comprises a significant number of females, which is not the case in Korea. In Korea, given that the numbers of women who participate in SU are more than men, there is a need to consider women's characteristics and educational needs much more closely.

In the ageing and learning society it can be argued that understanding how older people perceive their own way of learning with the interpretive perspective is important for further development. In addition to that, in terms of democratizing educational opportunities in the learning society, the culture of learning of older people needs to be reviewed according to the critical theories suggested in this thesis.

9.4 FUTURE RESEARCH

Even though in this study a critical perspective was used for analysing participants in two institutions, this study did not focus much on the issue of democratising educational opportunities among various groups of older people in a learning society. Older people are not a uniform group. There are major variations among older adults according to gender, social class, ethnicity, and other variables. Considering this heterogeneity, further research on how different groups of older people perceive their own ways of learning could be pursued with an interpretive perspective. Belanger & Tuijnman (1997) points out that the formation and repression of the cultural and educational aspiration of the ageing population and the cultural, economic, and social barriers they encounter are still poorly analysed.

I argue that more in-depth studies on the social context of older adults' lives should be pursued in order that we come to understand what meaning learning brings to their lives. If we study the social lives of older adults, what they do in their daily lives, then we will see how learning is derived from the complex issues and concerns they face. This would provide us with a fuller context for their learning.

One of the arguments for increasing educational opportunities for older people is that education could empower people, in particular those who are in lower socio-demographic status, even though a cause-effect relationship between education in later life and an individual ability to function effectively may be difficult to find. Sandra Cusack (2000) suggests that the conventional meaning of 'empowerment' has been 'power over' but it should be reframed as 'power to' and 'power with' and how this might enable older people to shape the policies and programmes that influence them. Research is needed into how this level of participation can be secured in different cultures and contexts.

In the future, more research might investigate the importance of learning in later life for the wellbeing of older people. Especially, more research is needed as to

how men and women differently spend their retirement and what place continuing learning has in their retirement activities of men and women.

From the perspective of comparative study in social gerontology, there should be further research based on cross-national studies. Sharf & Wenger (2000) argue that cross-national study tends to be underrepresented in gerontology. For the development of educational gerontology, more research to explore cultural characteristics of the learning of older people would contribute significantly to the development of the field.

The research of this thesis aimed to contribute both to the development of social gerontology and educational gerontology. It has shown some ways in which learning of older people is related to social context and culture by comparing the educational organizations of older people in two countries. Findings from the research have, to date, been disseminated through publication in the Korean Journal of Education Policy (Jun & Evans, 2007) and in the conference proceedings of the International Conference on Economics, Education, and Management on June, 2012 in Shanghai, China (Jun & Evans, 2012) (see Appendix 6). I hope that further investigations of the cultural meanings of the learning phenomenon will be made, based on this research.

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Appendix 1: Objects and Principles by Peter Laslett

[Please note: these Objects & Principles were originally published in September 1981 and slightly amended in 1984 for national circulation.   They were generally accepted by the Founding Committee of the University of the Third Age but have never been taken as hard and fast rules.   These are the amended version.]

OBJECTS

First: to educate British society at large in the facts of its present age constitution and of its permanent situation in respect of ageing.   One of the first of the 'old' societies, we find ourselves in a position which is bound to share with all developed societies and finally with the whole world's population.

Second: to make those in their later years in Britain aware of their intellectual, cultural and Aesthetic potentialities, and of their values to themselves and to their society. To assail the dogma of intellectual decline with age.

Third: to provide from amongst the retired, the resources for the development and intensification of their intellectual, cultural and aesthetic lives. In this way to help them to make effective and satisfying use of their freedom from work at the office, shop or factory.   To devise methods of doing this which can be afforded in Britain.

Fourth: to create an institution for these purposes where there is no distinction between the class of those who teach and those who learn, where as much as possible of the activity is voluntary, freely offered by the members of the university to other members and to other people.

Fifth: so to organise this institution that learning is pursued, skills acquired, interests are developed for themselves alone with no reference to qualifications, awards, or personal advancement.

Sixth: to mobilise members of the university so as to help the very large number of elderly persons in Britain standing in need of educational stimulation but who have no wish to engage in university studies.

Seventh: to undertake research on the process of ageing in society and especially on the position of the elderly in Britain and the means of its improvement.

Eighth: to encourage the establishment of similar institutions in every part of the country where conditions are suitable and to collaborate with them.

PRINCIPLES

- The University shall consist of a body of persons who undertake to learn and to help others learn. Those who teach shall also learn and those who learn shall also teach.

- Joining the university shall be a question of personal choice. No qualifications shall be required, and no judgement made by the university between applicants.

- Everyone joining the university shall pay for its upkeep and for instruction received. These payments shall be the sustaining revenue of the institution apart from the gifts by foundations. No support from the funds of local or central government shall be expected or sought.

- No salary, fee or financial reward shall be paid to any member of the university for teaching other members, counselling them, or helping them in any way.

- All members of the university shall be expected to offer voluntary service to it and to its activities in relation to society at large, especially to the elderly.

- Members shall be prepared to help to organise assistance in the way of voluntary man-power for educational and cultural and other institutions which may be able to use such manpower, and which under present conditions are prevented from fulfilling their functions as they would like. Examples are art galleries, museums and libraries.

- The undertaking of all members to teach as well as to learn may be fulfilled in the following ways other than instructions: Counselling other members, taking the university's offerings into the homes of the housebound, the bedridden, those in retirement institutions or in hospitals. Helping the effort to provide intellectual stimulus

for the mass of the elderly in Britain.   Taking part in any other offer of manpower made by the university and educational or cultural institutions which stand in need of it.

- The university itself shall not engage in the activity of judging between its members.   There shall be no examination system, neither degrees, diplomas or certificates shall be awarded.   Nevertheless classes within the university engaged in any particular intellectual or other exercise may decide on ways of recording an individual's success in the exercise in question.

- The curriculum of the university shall be as wide as resources permit, ranging from mathematics and the natural sciences, by way of philosophy, literature and history, to aesthetic, practical and physical training.   Nevertheless the preference of members will be the only criterion of what is done, and it is recognised that humane subjects are likely to predominate.

- The standards of the university shall be those set by its individual classes, and ways shall be devised to permit each member to find his own level.   There shall be no attempt to set a university-wide standard, or any assimilation with university standards elsewhere.

- Studies related to the specific situation of the elderly – social, psychological, physiological – shall be included as a matter of course.   They will be given no particular prominence in teaching but high priority in research.

- In pursuance of the aesthetic, art historical and topographical interests known to be popular with the type of student likely to be members of the university, special arrangements shall be sought with national bodies such as the Arts Council, the National Trust, the Department of the Environment, the Nature Conservancy and the Forestry Commission, so as to obtain the facilities required to develop instruction and research in these fields.   Voluntary assistance where appropriate [see above – Principle 6] shall be offered in return.

- Strong emphasis will be laid on research in all the university's activities.   Every member will be encouraged to join in the widespread accumulation of scattered data required for advancement in knowledge of certain kinds [for example, archaeology, natural history, the history of the population and social structure, the history of climate and geological

events).   Every member will be expected, where possible, to have a research project of his or her own, and to write up its results.   Engaging in research, however, shall not count as fulfilling the obligation to teach.

- Insistence on learning as an end in itself shall go along with an emphasis on the value of making things and acquiring and improving skills of all kinds.   The curriculum shall therefore include, if there is a demand, and if facilities can be found, such subjects as computer programming, accountancy, business and managerial studies, spoken languages and handicrafts in textiles, metal work, wood work, bookbinding, printing and so on.   Painting, sculpture and music shall be given high priority.

- Special importance shall be attached to physical training and suitable supporting activities, and negotiations entered into for these purposes with local institutions disposing of the facilities.

- The closest possible collaboration shall be maintained with the extramural boards of universities, with WEA and with all providers of adult education programmes in each area.   Ways shall be sought to take advantage of all such teaching and research facilities as may be available in any local institution and to negotiate for services of any individual willing to assist the university though not himself wishing to become a member.

- The form taken by each individual pursuit of the University of the Third Age shall be decided on each occasion by members collaborating for the purpose.   Though the conventionally taught 'class' will often be the form adopted, every encouragement will be given to seminars with many participants; readings with many participants; activities to sites of scientific, archaeological or historical interest: museums, art collections, houses and so on.

- Every effort shall be made to encourage interchange with universities of the third age at home and abroad, to exchange teaching with them, to collaborate on research with them; to unite with them in the furtherance of the intellectual interests of the elderly, especially in Britain.

- Apart from the voluntary research undertakings of its members on every suitable subject, the university shall seek to set up professional research activity in the processes of ageing, especially as social phenomenon.

TITLES

The word university in the name of the institution shall be used in its original sense, meaning a corporation of persons devoted to a particular activity, not necessarily intellectual.   It shall not be taken to denote all the associations which have grown up around the word, especially in the last century and in England.   Other academic titles shall be avoided as far as possible.

Appendix 2: Initial Thinking About the Establishment of the U3A - Observations from Professor David James, University of Surrey

'Learning' is any change in behaviour resulting from experience. When the brain ceases to respond to changes it is brain dead.   Therefore learning, like eating and breathing is essential for life.

These changes can result in either reinforcement or extension learning.   The former leads to increased security, the latter to stimulation and development. The balance between the need for these forms of learning changes from time to time in a person's life.

The concept of 'life strands' illustrates this in practical terms. As we go through life we develop different strands e.g. domestic/family strand, work strand, leisure strand.   If these are in balance a deficit in one can be compensated by another, e.g. a bereaved individual can throw him/herself into work.   As Jo Walker (cited in the thesis) shows for many people as they are, family commitments reduce and work becomes central to their lives and they have few interests outside it. Consequently when they retire they are left with a huge void (comparable with that left by bereavement) and 30 years ago, more than today, death came early to many retirees.   Hence the concept of retirement sudden death syndrome (comparable with bereavement sudden death syndrome) was developed to explain the demise of people who had nothing left to live for.

Initially the retired and/or bereaved person needed to comes to terms with and accept their new situation and needed security, support and comfort.   We used (in U3A) to guide our thinking, an appropriately adapted version of Maslow's Hierarchy of needs (Maslow, A.H (1970) Motivation and Personality.   New York: Harper Tow, 547,548).

Maslow's hierarchy of needs
Survival – food, warmth, a home to live in;

Safety – security (physical, social and financial);

Belonging – affiliation, acceptance;

Esteem – competence, approval, recognition;

Cognitive – to know, explore, understand;

Aesthetic – order, beauty;

Self actualisation – self fulfilment.

Consequently, U3A's first concern was to help people to adjust to and cope with the new situation in which they found themselves, to feel secure both at home and outside it and to meet with other people with whom they could relate.   This enabled individuals to identify and build on their strengths and interests in a congenial, supportive environment, be it initially as a group member and perhaps later as a group leader.   The study programmes were there for those who were ready for them. People differ in their needs and the U3A was designed to offer opportunities relevant to all.

Appendix 3: The Questionnaire for Institutional Survey

Date : _____   June or July 2006

Dear Mr. and Ms. :

LIFELONG LEARNING INSTITUTIONS SURVEY

I am a research student at the Institute of Education, University of London. I am doing a comparative research on the 'development of U3A in England and Korea'.   This survey is designed to get a broad picture of current state of U3A including learning services in a locality. The results of this study will help to design a learning system for older people. I am particularly interested in obtaining your response, as your experience, in developing learning programmes for older people, would be useful information to consider in making a good institutional policy for the programme. I would be very grateful if you could complete the enclosed questionnaire and return it to me, in the enclosed POST PAID envelope, by 25**th** **July 2006.**

Your answers will be treated as confidential. This survey will be used   for research purpose only.
The questionnaire should not take more than 30 – 40 minutes to complete. If you have any queries, please contact **Soo-Koung Jun** at 042 673 9310 or by email (skjun74@hanmail.net).   I would be pleased to send you a summary of the results of this survey, upon request. Thank you in advance for completing this form.

Yours faithfully,
Soo Koung Jun
This survey is designed for comparing U3A with similar one in Korea. Though there are some inappropriate questions to your U3A, please skip it.

Q1. When was your local U3A established? _____

Q2. How many members are registered currently in your U3A? _____

Q3. Who can be a member of your U3A? Is there any qualification or age limit?

Q4. Which way is your U3A based on?

    ☐ 1) Course-based (A course consists of several subjects)

    ☐ 2) Subject-based (Participants can choose subjects upon their interests)

    (If only Course-based) **How many <u>courses</u> do you provide currently?**

    _____

    How many <u>subjects</u> do you open currently? _____

Q5. What kinds of courses or subjects do you offer? **(If there is a brochure in which course or subjects are written, you don't need to write down all)**

Q6. Do you have any social activities besides learning activities?

Q7. In which way do you approach to learning in your U3A?

    ☐ 1) Formal learning oriented

    ☐ 2) Informal learning oriented

Q8. How are resources (e.g. space, financial management) acquired? **(Choose one)**

    ☐ 1) Determination of **fee-driven** approach

    ☐ 2) Determination of **free provision** based on grants, gifts and/or

        institutional revenue

    ☐ 3) Combination of both 1) and 2) above

    ☐ 4)   Determination of **need-driven of members** in groups

    ☐ 5) Other _____

Q9. What does it cost to join?

    1) Registration fee (if any) : £ _____

2) Membership fee (if any, annually) : £ _____

- Course fee (if any, normal range) : £ _____ ~ £ _____

4) Any other fees (if any):   _____

Q10. Funding for the organisation:

Local Governmenta l Grant	Participant fee	Gifts/donation s	( )	( )	TOTAL
%	%	%	%	%	100%

Q11. Who has a responsibility for running U3A?

_____

Q12. Do you have any paid staffs?

☐ 1) Yes   ☐ 2) No

If YES, how many paid staffs are there? _____

Q13. Do you have the committee?

☐ 1) Yes   ☐ 2) No

If YES, how many members of the committee are?

_____

If YES, who are they?

_____

Q14. What is the projected ideal participant size of your U3A?   _____

Q15. What is the ideal participant size in each group? _____

Q16. How has the number of members changed? If there was a big change, what was the reason for it?

_____

Q17. How does "the Third Age Trust" exercise interest (and control) in your local programme?

Q18. What kind of support do you get from "the Third Age Trust"?

Q19.   How was your local U3A mission determined and by whom? Has it changed over time?

Q20. How would you place the background of older people who use your organisation on average?

	Non-applicable	Very high	High	Normal	Low	Very low
1. The economical level		①	②	③	④	⑤
2. The educational level		①	②	③	④	⑤

Q21**.** Why do you think that older people participate in your programme?
(Choose all relevant and if any, please write others)**.**

    ☐ 1) Easy transportation

    ☐ 2) Reasonable fee (concession policy)

    ☐ 3) Excellence of programmes

    ☐ 4) Good teaching methods

    ☐ 5) A lot of activities

    ☐ 6) Good teachers

    ☐ 7) Accessible time table (Day class)

    ☐ 8) Other _____

Q22**.** Why do you think that more people have **not** participated in your programme? (**Choose all relevant and if any, please write others**)

    ☐ 1) Lack of information

    ☐ 2) Because they do not have enough financial resources for tuition

    ☐ 3) Because of health

    ☐ 4) Not enough time due to taking care of grandchildren

    ☐ 5) Due to transportation

    ☐ 6) Because they feel the programme is too difficult

    ☐ 7) Lack of motivation or interest

☐ 8) Other _____

Q23. Is there an attempt to recruit minority participants, people of different socio-demographic backgrounds, diverse age groups among seniors, the physically impaired (e.g. blind, deaf, wheelchair bound)? If YES, how do you do?

☐ 1) YES   ☐ 2) NO

If YES, how do you do?

_____

Q24. How do you let people know your local U3A? (Choose all relevant)

☐ 1) Information at a library

☐ 2) Through webpage (internet)

☐ 3) Words of mouth

☐ 4) Placards/ Posters

☐ 5) Issuing newsletter

☐ 6) Other _____

Q25. How and by whom are programmes determined?

☐ 1) Determined by curriculum committee

☐ 2) Determined by staff

☐ 3) Determined by participants(students)

☐ 4) Influence of other programme models

☐ 5) Expert-led or study circle or both

☐ 6) Use of pre-packaged modules

☐ 7) Other _____

Q26. What kind of programme do you think should **be the most** focused on in older people's learning provision? **(Choose one)**

☐ 1) General and academic courses

☐ 2) Vocational or skills acquisition

☐ 3) Leisure or hobby programmes

☐ 4) Other _____

Q27. What are the classes like?

_____

_____

Q28. What kinds of learning activities do you think older people **like the most? (Choose one)**

☐ 1) Listening to lectures

☐ 2) Joining in discussions

☐ 3) Involvement in activities

☐ 4) Practising skills (eg. For language learning)

☐ 5) Other _____

Q29. Who are the tutors or leaders?

_____

_____

Q30. Do you sometimes invite speakers? If YES, how often do you do? And how much do you pay for a lecture for one session?

☐ 1) YES   ☐ 2) NO

If YES, how often invite?

_____

If YES, how much do you pay for an session?

_____

Q31.Is there a place which belongs to your institution and is used only for learning activities?

☐ 1) YES   ☐ 2) NO

Q31.1. **If No**, where do you gather for learning activities?

_____

Q32. How is the success of the programme determined? (**Choose all relevant**)

☐ 1) Formal evaluations (survey)

☐ 2) Word of mouth

☐ 3) Increases of participant numbers

☐ 4) Enjoyment of participants

☐ 5) Other _____

Q33. What kinds of benefits do you expect participants in U3A programme acquire?

Q34. Who do you think are "old people" in a society?

Q35. What kinds of support do you have from your local government?

Q36. What kind of support do you think is needed from your local government?

Q37. Do you have any opinion in developing the learning condition for older people?

Thank you very much for completing this survey

Organisation's Name			
homepage			
Answer Name		Position	
Telephone		Fax	
Address			
Post-code			
Email			

This will be used only for research purpose. All information is confidential. IF YOU DO NOT FEEL COMFORTABLE DOING THIS, PLEASE TELL THE INTERVIEWER.

Q38. Gender : ☐ 1) Male   ☐ 2) Female

Q39. Age : _____

Q40. Do you live : ☐ 1) alone   ☐ 2) accompanied

Q41. Level of Education:

☐ 1) No formal education

☐ 2) Primary education

☐ 3) Secondary education

☐ 4) College/university education

☐ 5) Other _____

Q42. What is/was your job?

_____

Q43. How would you describe your current financial status?

☐ 1) High   ☐ 2) Above average

☐ 3) Average   ☐ 4) Below average

Q44. How would you describe your current condition of health?

☐ 1) Very good   ☐ 2) Fairly well

☐ 3) Do not feel well but nothing in particular

☐ 4) Sometimes ill   ☐ 5) Chronically   ill

Q45. Which do   you do the most in your free/leisure time mostly? (**Choose one**)

☐ 1) Listening to the radio, Watching television etc.

☐ 2) Playing card games, chess etc.

☐ 3) Reading the newspaper, magazines, books etc.

☐ 4) Doing art, music etc.

☐ 5) Doing activities, e.g. hiking, fishing, going for walk etc.

☐ 6) Others. _____

Appendix 4: The Additional Questions for Institutional Survey in the UK

- How was your U3A started?

- Without following title U3A, I believe you could set up a learning organization like U3A. Why did you decide to follow the U3A principles and decided to be under the umbrella organization of U3A TRUST?

- What factors do you think impact on that UK has developed the different U3A model from French one?

- I have heard that 2.50 Pounds per person (capitation fee) is sent to U3A Trust for insurance. Is it your case, too?

- Including insurance, do you find any usefulness of U3A Trust or do you can get a sense of secure from it?

- Do you have the constitution? How did you make it? Did you model one from U3A TRUST?   (Could you let me have one?)

- How could you classify your learning activities? Could you check the appropriate ones in you local U3A and please tell others you have?
    - academic lectures
    - discussion group
    - language practice
    - game
    - physical activities
    - study trip
    - music and arts
    - others

- What are the special characteristics of your U3A? In other words, do you have any distinguished points from other U3As?

Appendix 5: The Questionnaire for Participant Survey

Dear Mr. and Ms. :

Thank you very much for allowing me to interview you. I am carrying out a study looking at 'development of U3A in England and Korea and learning experiences at U3A. I know this kind of procedure is not easy, but no need to worry. Just tell me what you think. Your answers will be very helpful in my research. If you prefer to fill out this as a questionnaire for yourself instead of being interviewed, please don't hesitate to ask.

Everything said will be treated with total confidentiality. Your anonymity will be assured in my report. I will not report your answers directly to anyone, but I hope to be able to pass on some general opinions that will be useful to policymakers and practitioners without any mention of specific people.

First off, I will ask you about your experiences and opinions about learning at U3A and about being a senior citizen in society. After that, I am going to ask you to fill out some personal background questions.

  Contacts and questions: Ms. Soo-Koung Jun

School of Lifelong Education, Institute of Education

University of London

skjun74@hanmail.net

Yours faithfully,
Soo Koung Jun

Q1. **When** did you join your local U3A? _____

Q2. **How many subjects** have you taken at your U3A? _____

Q3. **What subjects** have you taken at your U3A so far?

Q4. **Which subject** do you like most out of those you have taken so far?

Q5. Do you know any other learning institutions (or learning places) you can join in your locality? Please, **provide the name of the institution** if you know any.

Q6.　Have you followed any other courses during the last three years apart from U3A?

　　　☐ 1) Yes　(☞ Go to Q6-1)　　　☐ 2) No　(☞ Go to Q7)

　　　Q6-1. Where did the course/s take place?　(Choose all relevant)

　　　　　☐ 1) At home (distance learning, correspondence etc.)
　　　　　☐ 2) Adult Education Centre
　　　　　☐ 3) Further Education College
　　　　　☐ 4) Primary, secondary school
　　　　　☐ 5) Voluntary organization
　　　　　☐ 6) Library
　　　　　☐ 7) Day Centre
　　　　　☐ 8) Private institutions
　　　　　☐ 9) County council
　　　　　☐ 10) Religious organization
　　　　　☐ 11) Others _____

Q7. How did you learn about U3A?
　　　☐ 1) by neighbours
　　　☐ 2) by friends
　　　☐ 3) by children
　　　☐ 4) in the newspaper
　　　☐ 5) from the library
　　　☐ 6) by placards /　posters on the walls
　　　☐ 7) by chance
　　　☐ 8) Others _____

Q8. Here is a list of possible reasons why one would participate in learning at U3A. Could you choose the 3 main reasons from this list in order why you took a subject at U3A? **(Please number 1, 2, 3 in the box** ☐**, <u>1 being the strongest</u> and <u>3 being the weakest</u>)**?

    ☐ 1) Because I like learning
    ☐ 2) Because it seems interesting
    ☐ 3) To develop myself
    ☐ 4) To be confident
    ☐ 5) To get a qualification
    ☐ 6) To kill the time
    ☐ 7) To get a job
    ☐ 8) To make friends
    ☐ 9) To keep healthy
    ☐ 10) To go out of the house
    ☐ 11) Because my family wanted me to
    ☐ 12) For something to do
    ☐ 13) Because someone forced me to do it
    ☐ 14) Others _____

Q9. Would you consider taking further subjects after the completion of your current study group?
    ☐ 1) Strongly Yes
    ☐ 2) Yes
    ☐ 3) No
    ☐ 4) I don't know

Q10. What subjects would you like to learn in the future at U3A?

Q11. What kinds of benefits do you acquire from participation in U3A programme?

Q12. Why do you think older people choose not to participate in any learning programme? Here is a list of possible reasons why older people do not join learning or education programme like one at U3A. Please write the number in order of their importance. **(Please number 1, 2, 3 in the box <u>1 being the strongest</u> reason and <u>3 being the weakest</u> reason)**

☐ 1) Too tired

☐ 2) Not enough time

☐ 3) Too expensive

☐ 4) Too far

☐ 5) Nothing interesting

☐ 6) Because of taking care of (grand) children

☐ 7) Difficult to take time from work

☐ 8) Because of health

☐ 9) Too old

☐ 10) Not interested

☐ 11) No need for qualification

☐ 12) Difficult to read and write

☐ 13) Difficult to follow course

☐ 14) No need to learn anymore

☐ 15) Afraid of being together with strangers

☐ 16) Afraid of going out of house

☐ 17) Because family doesn't want it

☐ 18) Others _____

Q13. Who do you think of as being old people?

_____

Q14. Would you consider yourself as being old?

☐ 1) YES (☞ Go to Q13-1)   ☐ 2) NO   (☞ Go to Q14)

If YES, please answer to why you think you are an old person.

Q15. How necessary do you think to learn in later life?

☐ 1) Very necessary   ☐ 2) Necessary

☐ 3) Not necessary   ☐ 4) I don't know

Q16. What kind of programme do you think should be the most focused on, in older people's learning provision? (Choose one)

- ☐ 1) General and academic course
- ☐ 2) Vocational or skills acquisition
- ☐ 3) Leisure or hobby programmes
- ☐ 4) Others   (_____)

Q17. What kinds of learning activity do you prefer the most? (Choose one)

- ☐ 1) Listening to lecture
- ☐ 2) Joining in discussions
- ☐ 3) Involvement in activities
- ☐ 4) Practising skills (eg. For language learnings)
- ☐ 5) Other (_____)

Q18. What kinds of elements do you think can be added or be changed for U3A to be improved?

Thank you so much for your cooperation and time so far.   From now on I will be asking some personal questions. You could fill them out yourself rather than being interviewed if you like. After filling it out, please put this slip into an envelop without marking your name on it. Thanks again.

This will be used only for research purpose. All information is confidential. IF YOU DO NOT FEEL COMFORTABLE DOING THIS, PLEASE TELL THE INTERVIEWER.

Q19. Gender : ☐ 1) Male ☐ 2) Female

Q20. Age : _____

Q21. Do you live : ☐ 1) alone ☐ 2) accompanied

Q22. Level of Education:

☐ 1) No formal education

☐ 2) Primary education

☐ 3) Secondary education

☐ 4) College/university education

☐ 5) Other _____

Q23. What is/was your job?

_____

Q24. How would you describe your current financial status?

☐ 1) High   ☐ 2) Above average

☐ 3) Average   ☐ 4) Below average

Q25. How would you describe your current condition of health?

☐ 1) Very good   ☐ 2) Fairly well

☐ 3) Do not feel well but nothing in particular

☐ 4) Sometimes ill   ☐ 5) Chronically   ill

Q26. Which do   you do the most in your free/leisure time mostly?

(Choose one)

☐ 1) Listening to the radio, Watching television etc.

☐ 2) Playing card games, chess etc.

☐ 3) Reading the newspaper, magazines, books etc.

☐ 4) Doing art, music etc.

☐ 5) Doing activities, e.g. hiking, fishing, going for walk etc.

☐ 6) Others. _____

Appendix 6: Published Output

1. Jun, S. K. (2004). Lifelong learning policy and the third age in England and in Korea. *Journal for Educational Development*, 25(1), Chungnam National University.)

2. Jun, S. K. (2006). A learning society and older people: exploring the connections with the UK case. *Journal for Educational Development*, 27(2).

3. Jun, S. K. and Evans. K. (2007). The learning cultures of Third Age participants: Institutional management and participants' experience in U3A in the UK and SU in Korea*. Journal of Education Policy*, KEDI, 4(2), 53-72.

4. Jun, S. K. and Evans, K. (2009). Book review of the comparative education research : approaches and methods edited by Mark Bray, Bob Adamson, and Mark Mason. *Asia Pacific Journal of Education*, 29 (1), 119 – 124.

5. Jun, S. K. and Evans, K. (2012). *A comparative study of two non-credit educational organizations for older people: university of third age(U3A) in the UK and Senior University (SU) in Korea*. Proceedings of ICEEM 2012, 2nd International Conference on Economic, Education, and Management. June 1-2, 2012, Shanghai, China.

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Faculty of Policy and Society

Email k.evans@ioe.ac.uk

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Institute of Education
University of London

TO WHOM IT MAY CONCERN

22nd October 2013

I hereby confirm that the contribution of SOO-KOUNG JUN to the following co-authored publications, cited in her thesis as arising from her doctoral research, was 95%. My supervisory input as co-author equates to 5% in both cases.

1) . Jun, S. K. and Evans. K. (2007). The learning cultures of Third Age participants: Institutional management and participants' experience in U3A in the UK and SU in Korea. *Journal of Education Policy*, KEDI, 4(2), 53-72.

2) . Jun, S. K. and Evans, K. (2012). *A comparative study of two non-credit educational organizations for older people: University of Third Age(U3A) in the UK and Senior University (SU) in Korea*. Proceedings of ICEEM 2012, 2nd International Conference on Economics, Education, and Management. June 1-2, 2012, Shanghai, China.

Yours faithfully,

Karen Evans

Professor Karen Evans

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