

## **PASCAL International Observatory Briefing Paper**

### **Cultivating Age-Friendly Institutions for Older Adults: Insights from Osher Lifelong Learning Institute Network in the United States**

Craig A. Talmage, Assistant Professor, Hobart & William Smith Colleges, Geneva, NY  
Richard C. Knopf, Professor and Director, Osher Lifelong Learning Institute at Arizona State University, Phoenix, AZ

R. Jack Hansen, Researcher, National Resource Center for Osher Lifelong Learning Institutes, Northwestern University, Chicago, IL

Kevin M. Connaughton, Manager of Adult Learning, National Resource Center for Osher Lifelong Learning Institutes, Northwestern University, Chicago, IL

Steven P. Thaxton, Executive Director, National Resource Center for Osher Lifelong Learning Institutes, Northwestern University, Chicago, IL

### **Acknowledgements**

Special gratitude to Cindy Warren at Hobart & William Smith Colleges for copy-editing this briefing paper.

### **Executive Summary**

Across the world, social institutions, such as colleges and universities, are being challenged to adapt to meet the diverse needs of older adults. In the U.S., the Osher Lifelong Learning Institute (OLLI) network of 124 institutions housed within U.S. colleges and universities are seeking ways to become even more age-friendly as they deliver lifelong learning programs for older adults. In so doing, some OLLIs<sup>1</sup> are even challenging their home institutions to more broadly become age-friendly to address growing older adult needs throughout the entirety of their institutions.

This paper highlights insights gleaned from research on the aspirations and operations of OLLIs. Much of this research comes from work conducted by the National Resource Center for Osher Lifelong Learning Institutes (Osher NRC), which offers a variety of support services to OLLIs and their leaders. Through the Osher NRC, many evidence-based revelations span important themes such as demographic trends, learner preferences (e.g., course topics), barriers to learning, technology utilization, and perceptions of the value of lifelong learning. In this brief, both practical and research implications are shared based on the findings of multiple studies and publications generated by the Osher NRC.

### **The Journey Towards Age-Friendliness**

The learning needs of older adults are not homogenous, and lifelong learning researchers and practitioners now further acknowledge this diversity. Recognizing the need for

---

<sup>1</sup> Not all Osher Institutes use the OLLI acronym, but all OLLIs are affiliated with the Osher NRC.

educational institutions to be more inclusive, many higher education institutions across the world have coalesced to form the Age Friendly University (AFU) movement. The AFU movement was aptly named to parallel Ireland's declaration as the world's first age-friendly country (Age Friendly Ireland, n.d.). In fact, Dublin City University (DCU) in Ireland initiated the AFU movement in 2012 (Talmage, Mark, Slowey, & Knopf, 2016). The first members to join the AFU were Strathclyde University in Glasgow, Scotland and Arizona State University (ASU) in Phoenix, Arizona, USA. Now, the AFU movement consists of over 50 affiliated institutions (DCU website, n.d.).

With DCU taking the lead, the AFU has ten established principles, which have started to be evaluated and explored worldwide (e.g., Pstross et al., 2017; Talmage et al., 2016). DCU has also hosted two global conferences with a third conference planned for 2021 focused on the AFU movement and its principles. The ten principles taken from DCU's (n.d.) website are (emphasis is from DCU website):

1. To encourage the participation of older adults in all the **core activities** of the university, including educational and research programmes.
2. To promote personal and career development in the second half of life and to support those who wish to pursue "**second careers**".
3. To recognise the **range of educational needs** of older adults (from those who were early school-leavers through to those who wish to pursue Master's or PhD qualifications).
4. To promote **intergenerational learning** to facilitate the reciprocal sharing of expertise between learners of all ages.
5. To widen access to **online educational opportunities** for older adults to ensure a diversity of routes to participation.
6. To ensure that the university's **research agenda** is informed by the needs of an ageing society and to promote public discourse on how higher education can better respond to the varied interests and needs of older adults.
7. To increase the understanding of students of the **longevity dividend** and the increasing complexity and richness that ageing brings to our society.
8. To enhance access for older adults to the university's range of **health and wellness** programmes and its **arts and cultural activities**.
9. To engage actively with the university's own **retired community**.
10. To ensure regular **dialogue** with organisations representing the interests of the ageing population.

While the term "age-friendly" applies well to all ages, age-friendly generally applies towards welcoming and supporting older adults and their needs, wants, and talents.

The OLLI network in the United States (U.S.) began in 2001 with funding from The Bernard Osher Foundation. Quickly, the OLLI network experienced rapid growth more than doubling its size from approximately 40 OLLIs in 2004 to more than 80 OLLIs in 2006. Today, the OLLI network consists of 124 institutes with over 170,000 older adult learners aged 50 and older. Of the U.S. AFU members, eight universities host OLLIs: (1) Arizona State University; (2) California State University – Long Beach; (3) Florida State University;

University of California, Los Angeles; (4) University of Massachusetts at Boston; (5) University of Montana; (6) University of the Pacific; (7) University of Rhode Island; and, (8) Washington University in St. Louis.

OLLI are independent programs (*not* independent organizations) affiliated with colleges or universities, and more than 50% are housed in adult and continuing education divisions. They offer diverse collections of university-level courses, activities, and events for *no* credit with university-affiliated instructors. OLLIs often pursue innovative, intergenerational, and community-engaged learning techniques (Pstross et al., 2017; Talmage et al., 2016). Higher education institutions may also offer benefits to OLLI learners, such as library privileges (Osher NRC, 2018). Scattered across the U.S., OLLIs have had the opportunity to become models for age-friendly practices for higher education institutions (Talmage et al., 2016).

OLLI receive financial support via endowment funding from The Bernard Osher Foundation, and OLLIs receive support services from the Osher NRC at Northwestern University. The Osher NRC conducts research on OLLIs and advises research efforts at individual OLLIs. Since 2014, the Osher NRC has conducted a biennial survey concerning the learning demographics, topic interests, barriers to learning, technology utilization, and other special topics. Individual OLLIs like ASU have also conducted their own studies.

A wealth of research exists regarding older adult lifelong learning: Over 19,000 Google Scholar hits including “older adults” and “lifelong learning”. But, scant research exists regarding older adult lifelong learning institutes: Less than 400 Google Scholar hits including “older adults” and “lifelong learning institutes”. Thus, the question, *how can we (co-)create age-friendly institutions?*, undergirds this briefing paper to facilitate the development of better age-friendly practices across higher education institutions. The research summaries and practice insights shared hereafter are derived from Osher NRC and OLLI at ASU research efforts and have been shared at previous AFU conferences.

## **Research Lessons on Age-Friendliness**

**What are the most popular research topics for studies of OLLIs?** The Osher NRC has explored sixty articles that have directly investigated OLLIs and their learning communities. Using a content analysis approach, the Osher NRC researchers found the most popular research topic was cognitive health. Transformation from learning and the demographics of learners tied for the next most popular research topics. The structure and design of lifelong learning institutes followed in level of research interest. Tied for the fifth were creative expression and technological literacy. Based on these findings, the Osher NRC researchers generated twelve specific research questions to shift research and practice regarding lifelong learning institutes. These questions can help institutions become more inclusive and age-friendly (Talmage, Hansen, Knopf, & Thaxton, 2018). Despite pursuits towards innovative, intergenerational, and community-engaged learning, previous research on OLLIs has not frequently addressed pedagogy, intergenerational learning, and community engagement.

**Who are OLLI learners?** According to national Osher NRC research, men, non-white, and non-university educated persons are underrepresented in OLLIs (Hansen, Brady, & Thaxton, 2014; Hansen, Talmage, Thaxton, & Knopf, 2019; Hansen, Thaxton, Connaughton, Talmage, & Knopf, forthcoming). The gap between male and female involvement in OLLIs appears to decrease with age (Hansen et al., 2019; forthcoming). The 2018 Osher NRC survey figures show 69% of learners surveyed identified as women, and 64% of learners indicated they are married/partnered. While 91% of learners surveyed identified as white, the small proportion of Black/African American (3%) and Latinx persons (2%) may have slightly increased from 2016 to 2018 (Hansen et al., forthcoming). The Osher NRC's (2018) survey of over a hundred OLLI directors corroborates these figures with estimates that 89% of OLLI learners are white. Nearly 90% of OLLI learners have a bachelor's degree or higher, and the majority of those individuals have a master's degree or higher (Hansen et al., forthcoming). These figures bring forth questions regarding how to structure OLLIs and deliver content that is more inclusive. Overall, the breadth of opportunities for OLLIs to reach more diverse persons and perspectives showcases the need to explore intersectionality regarding age and other identities.

**What are OLLI learner barriers?** Younger OLLI learners identify time as the most important limitation upon their participation (Hansen et al., 2019, forthcoming). Specifically, part-time work imposes time and schedule limitations that can impact OLLI participation. Especially for learners 85 and older, rapid changes in mobility and needs for assistance appear to contribute to an increased decline in OLLI participation (Hansen et al., 2019). Relatedly, transportation appears to be a substantial barrier for those 80 and older (Hansen et al. forthcoming). Thus, age-friendliness requires structural institutional changes in order to continue to reach older adults as they age and their needs change.

**What is the value of lifelong learning to OLLI learners?** The 2016 Osher NRC survey asked participants to indicate what they valued about their OLLI experience. By content coding approach of 4,400 responses, the NRC identified four overarching research themes. The four themes with accompanying exemplars of learner testimonies are depicted below (Talmage, Hansen, Knopf, Thaxton, McTague, & Moore, 2019).

### 1. Learning Experience Value Responses

- *These classes have opened and expanded my mind to new ideas, concepts, and have enthralled me. Things have come together in my learning, which has been so exciting.*

### 2. Community Environment Value Responses

- *Certainly the learning aspect is foremost, but the relationships and sense of community are a wonderful, additional benefit.*

### 3. Learning Quality Value Responses

- *Excellent administration, terrific selection of courses, great teachers and students, great travel program.*

#### 4. Learning Access Value Responses

- *Close to home, and the fact that there are courses such as the New Yorker structured in a way that I can miss sessions and still participate* (quotes taken from p. 18-19)

Across the four themes, over 30% of OLLI learners' responses showed value for the new insights they gained from learning. Nearly 20% of responses indicated value for socializing and social activities. Around 18% of responses valued quality programming, and around 14% valued quality instruction. Less than 6% concerned accessibility to learning (Talmage et al., 2019). Thus, the value of age-friendliness goes farther than achieving accessibility. These notions are essential given the estimated median attrition rate (i.e., those who do not renew each year) is around 20% for OLLIs (Osher NRC, 2018); however, many other factors not tied to OLLIs can affect attrition such as relocation, death, and family changes.

**What do OLLI learners want to learn?** Researchers explored which learning topics substantially draw enrolment in courses at OLLI at ASU. The team utilized registration data consisting of over 7,000 attendees across 290 courses. After accounting for structural arrangements (i.e., class time, day, number of sessions, and location), the team identified significant interest in global issues, religion, and philosophy. Furthermore, OLLI learners were particularly interested in what the team termed micro-social issues, that is, courses focusing on particular groups and individuals during particular time periods (Talmage, Lacher, Pstross, Knopf, & Burkhart, 2015).

Looking at the report from Osher NRC's 2018 national survey data (i.e., Hansen et al., forthcoming), history is the most popular topic for both men and women. Fine arts are next most popular for women, and current affairs are next most popular for men. Religion and philosophy were sixth (out of thirteen) most popular for women and men. These differences between the national survey and that from OLLI at ASU may reflect the uniqueness of individual OLLIs, which should be explored.

Not all institutes are alike in their demographics. In their study, Talmage and colleagues (2016) noted variations among the OLLIs regarding what their learners valued concerning lifelong learning. Furthermore, OLLI learners may say they are interested in particular courses, but actually enrol in others; this notion should be investigated both within and across institutes and longitudinally as well. Furthermore, the current demographic trends in OLLIs (i.e., educated white women of means) limit researchers' understandings of which topics draw older adults with different backgrounds or identities to enrol in courses.

**How do OLLIs transform learners?** OLLI participation has been positively linked to personal transformations in quality of life, understandings of self, and sense of community (Talmage & Knopf, 2018; 2019; Talmage, Ross, Searle, & Knopf, 2018). Pstross, Peterson, Talmage, and Knopf (2017) proposed seven community-building pursuits for lifelong learning that can transform learners. Their work focused on: (1) asset-based thinking; (2) critical reflection; (3) systems thinking; (4) cognitive vibrancy; (5) inclusiveness; (6) creative expression; and, (7) purpose in life.

Building on this work, Talmage and Knopf (2018; 2019) asked a subset of older adults at OLLI at ASU to critically reflect on their purposes in life and big questions they are pursuing. Talmage and Knopf (2018) unearthed older adults' reflections on how to amalgamate wisdom and curiosity. For wisdom, OLLI learners highlighted the importance of being open, asking questions, and making wise decisions. For curiosity, OLLI learners noted that OLLI experiences allow individuals to learn more about new topics, find purpose and meaning, and answer questions, big and small (Talmage & Knopf, 2018). In their next piece, Talmage and Knopf (2019) identified the importance of OLLI learners' family stories and family-related phenomena regarding their learning attitudes and behaviors.

These three studies mentioned reflect the tenets of Lars Torstam's (2011) gerotranscendence theory and the AFU's ten principles. Perhaps, the question, *how can we (co-)create age-friendly institutions?*, also requires researchers and practitioners to first ask, *how **does** lifelong learning transform older adults?* Such a question can be followed by *how **can** lifelong learning transform (all) older adults?* These broad core questions can help blend research lessons and practice insights when co-creating age-friendly institutions.

## **Practice Insights for Age-Friendliness in Higher Education Institutions**

**How do we structurally move towards age-friendliness?** The aforementioned research can help shift practice to better build age-friendly communities and make higher education institutions age-friendly. Talmage and colleagues (2016) suggest age-friendliness can bring forth economic and social benefits to older adults and higher education institutions. For those benefits to be realized, institutions striving towards the ten AFU principles must be innovative and enact strategic institutional change. For example, only 60% of OLLI directors indicated their OLLI learners are provided dedicated lounge and common areas. The majority of OLLIs (67%) appear to offer complimentary parking to OLLI learners (Osher NRC, 2018); however, the OLLI directors' survey does not ask who bears the cost of complimentary parking privileges. Transportation, which includes parking, remains a large barrier for older adults, and only 26% of OLLIs appear able to provide learners with transportation services (Osher NRC, 2018). Again, structural institutional change is much needed across higher education and across OLLIs.

### **What role does intergenerational learning play in increasing age-friendliness?**

Intergenerational learning can also help shift practice towards age-friendliness. Pstross and colleagues (2017) believe that such intergenerational learning can occur on-campus or off-campus. They note that age-friendly intergenerational learning requires dedicated faculty members to cultivate and sustain long-term partnerships. Finally, they highlight a need for research-based innovative models to better inform practice.

**How do we use technology to become more age-friendly?** Older adults appear to be adopting technology at greater rates than in the past (Anderson & Perrin, 2017). In the 2018 survey, 99% of OLLI learners use a laptop/desktop computer (Hansen et al., forthcoming). Ipad/tablet use has increased from 44% to 64% from 2014 to 2018 (Hansen et al., forthcoming). Facebook is their most preferred social media platform; just over 49%

of OLLI learners use Facebook, and just over 37% of OLLI learners use YouTube. OLLI learners are also significantly using photo/video sharing sites more than in the past, after comparing the 2014 and 2018 data (Hansen et al., forthcoming). Finally, around 1 in 5 OLLI learners have experience with non-OLLI distance education resources (Hansen et al., forthcoming). OLLIs have room to greater integrate and embrace technology.

The NRC research team dove deeper into the 2016 survey data to investigate how to reduce barriers to OLLI participation. The team found that technology based instruction (TBI) can help older adults overcome time constraints (e.g., work or family) and distance limitations (e.g., rural areas). TBI can also help learners better access and interact with experts in the field and other learners. They raised concerns that TBI may be limited in providing high quality social engagement (Hansen, Talmage, Thaxton, & Knopf, in press). TBI may be one of the keys to increase institutional age-friendliness.

**Where should practice go?** In summary, this briefing paper concludes with ten insights that complement the ten AFU principles to help higher education institutions shift practice towards age-friendliness. They are:

1. Continuously question the field of lifelong learning and investigate best practices for lifelong learning institutes;
2. Listen to the multitude of voices found in lifelong learning, especially current and potential lifelong learners;
3. Discover new pathways towards inclusivity of diverse learners to reach more men, non-white, non-university educated, and rural older adults;
4. Consider the changing assistance and mobility challenges and needs, especially as individuals reach upper limits of age;
5. Recognize the roles of culture and history in lifelong learning experiences;
6. Be flexible to account for part-time workers' schedules and potential schedule conflicts;
7. Continue to evaluate the topics of interest to older adults of different backgrounds;
8. Explore what lifelong learners value most when structuring lifelong learning institutes and planning course offerings;
9. Embrace online, hybrid, and distance learning technologies; and,
10. Empower older adults to take ownership over their lifelong learning experiences.

These ten insights are not an exhaustive list, but they can provide practitioners with starting points. They also provide avenues for researchers to bridge research and practice in their future work.

## Conclusion

How can lifelong learning institutes in higher education become more forceful influencers of change in their host institutions to cultivate more inclusive, age-friendly practices? Lifelong learning institutes first must continue to develop more evidence of the fundamental precipitators of transformative learning experiences for older adults. By increasing research on the needed role of pedagogical and operational change to better

respond to the needs, proclivities, and aspiration of older adults, institutes like OLLIs can serve to advance more inclusive policy-formation at the university level. Furthermore, practitioners and recipients of these transformative outcomes must be engaged in research to help define what the very nature of an age-friendly institution might look like. Lifelong learning continues to be desired by older adults, and carries lifelong impact. To meaningfully reveal the full dynamics and impacts of lifelong learning institutes, much more work is needed in the U.S. and abroad.

## References

- Anderson, M., & Perrin, A. (2017). Tech adoption climbs among older adults. Pew Research Center Report. Retrieved 22 September 2019 from <http://www.pewinternet.org/2017/05/17/technology-use-among-seniors/>.
- Age Friendly Ireland (n.d.). Age Friendly Ireland: Home page. Retrieved 22 September 2019 from <http://agefriendlyireland.ie>.
- Dublin City University (DCU). (n.d.). About Age Friendly University: Age friendly principles and how to join. Retrieved 22 September 2019 from <https://www.dcu.ie/agefriendly/principles.shtml>.
- Hansen, R. J., Brady, E. M., & Thaxton, S. P. (2016). Demographic and behavioral characteristics of Osher lifelong learning institute members. *The Journal of Continuing Higher Education*, 64(1), 42-50.
- Hansen, R. J., Talmage, C. A., Thaxton, S. P., & Knopf, R. C. (2019). Barriers to age-friendly universities: Lessons from Osher Lifelong Learning Institute demographics and perceptions. *Gerontology & Geriatrics Education*, 40(2), 221-243.
- Hansen, R. J., Talmage, C. A., Thaxton, S. P., & Knopf, R. C. (in press). Enhancing older adult access to lifelong learning institutes through technology-based instruction: A brief report. *Gerontology & Geriatrics Education*.  
<https://doi.org/10.1080/02701960.2019.1618852>.
- Hansen, R. J., Thaxton, S. P., Connaughton, K. M., Talmage, C., & Knopf, R. C. (forthcoming). Report on the 2018 National Survey of the Osher Lifelong Learning Institutes' membership. National Resource Center for Osher Lifelong Learning Institutes: Evanston, IL. Technical Report.
- National Resource Center for Osher Lifelong Learning Institutes (Osher NRC). (2018). 2018 benchmarking survey. National Resource Center for Osher Lifelong Learning Institutes: Evanston, IL. Internal Dataset.
- Pstross, M., Corrigan, T., Knopf, R. C., Sung, H., Talmage, C. A., Conroy, C., & Fowley, C. (2017). The benefits of intergenerational learning in higher education: Lessons



- learned from two age friendly university programs. *Innovative Higher Education*, 42(2), 157-171.
- Pstross, M., Peterson, C. B., Talmage, C. A., & Knopf, R. C. (2017). In search of transformative moments: Blending community building pursuits into lifelong learning experiences. *Journal of Education, Culture and Society*, 2017(1), 62-78.
- Talmage, C. A., & Knopf, R. C. (2018). Wisdom and curiosity among older learners: Elucidating themes of well-being from beautiful questions in older adulthood. *OBM Geriatrics*, 2(4), 025.
- Talmage, C. A., & Knopf, R. C. (2019). Considering family stories and phenomena in older adult lifelong learning. *HSA Journal of Gerontology & Geriatric Medicine*, 5, 033.
- Talmage, C. A., Hansen, R. J., Knopf, R. C., & Thaxton, S. P. (2018). Directions for 21st century lifelong learning institutes: Elucidating questions from Osher lifelong learning institute studies. *Alberta Journal of Educational Research*, 64(2), 109-125.
- Talmage, C. A., Hansen, R. J., Knopf, R. C., Thaxton, S. P., McTague, R., & Moore, D. B. (2019). Unleashing the value of lifelong learning institutes: Research and practice insights from a national survey of Osher Lifelong Learning Institutes. *Adult Education Quarterly*, 69(3), 184-206
- Talmage, C. A., Lacher, R. G., Pstross, M., Knopf, R. C., & Burkhart, K. A. (2015). Captivating lifelong learners in the third age: Lessons learned from a university-based institute. *Adult Education Quarterly*, 65(3), 232-249.
- Talmage, C. A., Mark, R., Slowey, M., & Knopf, R. C. (2016). Age friendly universities and engagement with older adults: Moving from principles to practice. *International Journal of Lifelong Education*, 35(5), 537-554.
- Talmage, C. A., Ross, A., Searle, M., & Knopf, R. C. (2018). The social and cognitive transformation of older adult women: An analysis of community well-being for a university-based lifelong learning community. *International Journal of Community Well-Being*, 1(1), 11-31.
- Tornstam, L. (2011). Maturing into gerotranscendence. *Journal of Transpersonal Psychology*, 43(2), 166-180.