A model of promoting active ageing through elder learning:

The Elder Academies Network in Hong Kong

Abstract

This paper presents the Elder Academy Network as the policy and practice in promoting active ageing through elder learning in Hong Kong. First, the paper examines how the change in demographics and the prevalent trend of an ageing population have propelled the government in Hong Kong to tackle issues and challenges brought about by an increasing proportion of the elderly population. Second, the political and cultural contexts are critically discussed to identify the rationale underlying the successive implementation of a series of major reforms within a short time in areas including elderly welfare by the post-colonial Hong Kong government. Third, the Elder Academy (EA) Network is introduced to provide a model of cross-sectoral collaboration in the provision of elder learning involving the government as coordinator working jointly with schools, service agencies and universities to form a network of elder academies providing a myriad of learning opportunities for elders to pursue in their late-life years. Finally, the EA network is critiqued for its benefits and limitations, warranting a need for research and evaluation before the Hong Kong experience can be shared and the EA model of active ageing through elder learning be emulated in places outside of Hong Kong.

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Hong Kong is a world-class metropolis with a history of British colonization until June 1997. Since July 1st 1997, it has become a special administrative region of PRC China which allows Hong Kong to largely preserve its political, social and economic systems and capitalist lifestyles of the populace under the policy of 'one country, two systems'. Notwithstanding its fast economic growth in the past few decades, Hong Kong, like many developed

economies in the world, is facing an unprecedented challenge presented by an ageing population, which is graying at a rate faster than expected.

By world standards, Hong Kong is already an ageing society. The widely used definition of the United Nations (UN) defines an ageing society as one in which the 65+ age group accounts for more than 7% of the total population. According to the census statistics provided by the Hong Kong government, the proportion of those aged 65 and over has increased from 5% in 1975 to 13% in 2008. The proportion is projected to increase further to 28% by 2039 (Census and Statistics Department, 2010). Hong Kong is not alone in facing the prospect of having an ageing population, nor is this a recent trend. The UN predicts that by 2050, the number of older persons in the world will surpass the number of young for the first time in history and that the rate of population ageing in the 21st century will exceed that in the 20th (United Nations, 2010). The reasons to explain such global phenomenon are obvious. People live longer because healthcare and lifestyles are improving. To make it worse, people are having smaller families with fewer children. Simply put, population ageing arises from two related demographic effects – increasing longevity and declining fertility. In Hong Kong, the average life expectancy at birth was 80.1 for men and 86 for women in 2010, which is very high by world standards. However, Hong Kong has a very low fertility rate of 113 per 1000 women in 2010, the second lowest in Asia after Taiwan at 90 per 1000 (Census and Statistics Department, 2010). As a result, population ageing occurs because of rising life expectancy and declining birth rates.

Demographic changes and active ageing

Such pronounced changes in demographics are bound to have a significant impact. An ageing population is more demanding in respect of retirement protection and public services, such as healthcare. However, on a positive note, older people can now live longer and more active lives and can also be productive as contributors to society if they are given the opportunities. To address issues arising from the ageing population and to mitigate its adverse consequences, policies are needed to foster the concept of active and positive ageing and strategies to maximize the quality of life and well-being of the elderly. In Hong Kong, the Elderly Commission, a statutory body set up in 1997 by the government, is tasked with the responsibilities of advising the government on all matters related to the policies and strategies pertinent to the promotion of well-being and quality of life for the elderly in Hong Kong.

In the literature, various descriptions are used to depict the desirable state of ageing where quality of life is being maintained. These descriptions include 'positive ageing' (Minichiello &

Coulson, 2005), 'active ageing' (World Health Organization, 2002), and 'successful ageing' (Rowe & Kahn, 1998), which all offer a positive, multi-dimensional approach with emphasis on the importance of maintaining and fostering the physical and mental well-being of people as they age. Among these various descriptions, the WHO's official description of active ageing is most widely adopted. It defines active ageing as "the process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age" (WHO, 2002: 12). In this light, active ageing is conceived as multi-dimensional, cognizant of a broad array of factors that contribute to the maintenance of health and independence through lifestyle choices, quality of life, engagement in activities, and exploring the perceptions of ageing and retirement (Grant, 2008). Central to the WHO's definition of active ageing is the participation component in which continued learning should play an important role. The benefits of continued learning for elders are well documented as reported by Tam (2012). Many studies have shown that learning played a vital role in maintaining cognitive functioning and capability even in old age (for example, Ardelt, 2000; Boulton-Lewis et al., 2006; Dench & Regan, 2000; Glendenning, 1997; Withnall, 2000). There is also much research evidence to support the view that older adults who are stimulated mentally experience less decline in memory and intellectual ability (for example in Cavannaugh & Blanchard-Fields, 2006; Cohen, 2001; 2006; Sherman, 2006). Learning can also be a rewarding activity in itself, improving the individual's social relations as/she interacts with, and learns from, others, be they young or old (Ala-Mutka et al., 2008). In summary, older persons benefit from maintaining social connections in many ways through participation in learning.

Political and cultural contexts for ageing policies in Hong Kong

As Hong Kong has become more affluent since the 1970s and 80s, it is politically necessary for the colonial government to formulate social welfare policies to commit resources in sectors that required government support and policy attention. One of the sectors was elderly welfare which was the focus of the Government's *1979 Social Welfare White Paper* and the *1982 Programme Plan on Services for the Elderly*. In these documents, the policy objective was "to promote the well-being of the elderly in all aspects of their living by providing services that will enable them to remain members of the community for as long as possible ..." (Social Welfare Department, 1979; 1982). These policy directives continued into the 1990s when the government published the *1991 White Paper on Social Welfare Services and Policies for the 1990's and Beyond*. In it, attention was drawn to the respective roles of government and non-government organizations (NGOs) in the provision of social welfare services that contributed to the promotion of the well-being of the elderly (Social Welfare Department, 1991). A few years later, the *Report of the Working Group on Care for the*

Elderly first introduced the concepts of dignity of older persons, ageing in place, continuum of residential care, and people-based services (Lau & Wong, 1997). But it was not until after the handover of sovereignty from Britain to China in July 1997 did elderly welfare take centre stage in the Hong Kong government's long-term policy planning. In his inaugural *Policy Address*, the first Chief Executive of the Hong Kong Special Administrative Region (HKSAR) designated 'Care for Elders' as one of his strategic policy objectives, with the aim of "improving the quality of life of elders and providing them with a sense of security, a sense of belonging, and a feeling of health and worthiness" (Tung, 1997). At the same time, the Chief Executive established the Elderly Commission (EC), a high-powered body comprising professionals, academics, and service providers, to provide advice to the government on policies and services for elders to help address issues and challenges brought forth by the ageing of the Hong Kong population.

These policy initiatives and commitments to elderly welfare by the new HKSAR government can be justified by both political and cultural reasons. Politically, the post-1997 period is important in the history of Hong Kong, which saw the transformation of Hong Kong from a former British colony to a special administrative region in PRC China. Soon after the Chief Executive of the new HKSAR administration was sworn in, he rolled out a basket of massive political reforms in areas including housing, education and social welfare. This is conceived by Scott (1999) as an important attempt by the new executive-led local administration to demonstrate 'performance legitimacy' through major political reforms in the new era of post-colonization. In a similar vein, Lau (2002: ix) also pointed out that the Chief Executive is in fact trying to launch "in rapid succession a large number of bold initiatives on various fronts with the purpose of 're-inventing' Hong Kong in a short period of time." Formerly ruled by the British government through the Governor of Hong Kong, the new HKSAR is keen to be seen capable of sustaining fast economic growth, prosperity and stability for Hong Kong in the post-colonial era under the mandate of 'Hong Kong people ruling Hong Kong'. It is important for the new administration to demonstrate competence in governing Hong Kong and building a society that is more harmonious, prosperous and stable than before when Hong Kong was a British colony. By rolling out and implementing sweeping reforms for long-term development, the HKSAR administration is ambitious to revamp Hong Kong within the shortest time possible, resulting in a new and better Hong Kong that is ruled by its people and for its people.

In addition to political reasons, there are also cultural values that underlie the ambitious plan of the HKSAR government to build a better Hong Kong after the British rule. Hong Kong has a population of slightly over 7 million, 98% of which is made up by ethnic Chinese. Although Hong Kong is a world-class metropolis situated in the crossroads where East and

West meet, it is predominantly a traditional Chinese society which highly values traditional Chinese virtues such as filial piety, respect for the elderly and caring for them when they get old. So when the new SAR government promulgated its policy objective of 'Caring for the Elderly', which was aimed at improving the quality of life of elders, to ensure that they will continue to enjoy a sense of security, a sense of belonging and a feeling of health and worthiness (Tung, 1997), the society widely supported it despite the foreseeable strain on government coffers due to the greater expenses to be incurred by the provision of better and more caring services for the elderly. To take forward the government's policy objective of "promoting a sense of worthiness among the elders", the Social Welfare Department launched in 1998 'The Opportunities for the Elderly Project (OEP)', which has subsidized various social service agencies, district organizations, volunteer groups and educational agencies to offer a wide range of learning programmes in order to promote a sense of worthiness among the elders and to advocate a community spirit of care for the elders. The promotion of lifelong learning and advancement among the elders have a broad, popular appeal as the importance of learning for self-betterment and personal development is widely accepted among Chinese people and is deeply entrenched in their culture. Through the OEP project from 1998 to 2007, elders were encouraged to take part in community affairs, to contribute to society by making good use of their expertise and rich experience in life, resulting in a more enjoyable and rewarding later life and a stronger sense of worthiness.

In the *Report on Healthy Ageing* released in 2001 by the Elderly Commission, the benefits of continued learning by and for the elderly were identified as it said "many studies have shown that continued education could enhance the ability of older persons to cope with problems and to lead an active life" (Elderly Commission, 2001). The report also dispelled the myth that elders do not need further education. In fact, they have diverse educational needs which motivate them to pursue continuing education for various purposes including personal enrichment and development, career transitions, literacy and basic education, civic participation and social contribution. The role of elder learning in promoting healthy and active ageing was further confirmed by the Elderly Commission later in its Report on the Healthy Ageing Campaign (Elderly Commission, 2004). Through this 3-year campaign, senior volunteerism and lifelong learning among elders were encouraged by the government's effort to engage many NGOs in the running and provision of a variety of interest courses, including life skills and IT skills, reading and language classes for elders in their social centres. With concerted efforts from the government and NGOs, many activities and programmes were organized to encourage community participation in promoting healthy ageing. The *Report on Adding Life to Retirement Years* published by the Elderly Commission in 2003 advocated the preventive and life-course approach to healthy ageing by encouraging elders

to update themselves and to reconstruct the image of ageing and improve intergenerational connectivity through lifelong learning.

A model of elder learning: The Elder Academies Network in Hong Kong

Notwithstanding these various important reports and initiatives by the government to promote elder learning for active ageing, it was not until early 2007 did elder learning become the focus of a particular government policy on ageing. In 2007, the Elderly Commission launched a school-based Elder Academy (EA) Scheme which aims to provide opportunities for elders to pursue continued learning and participate in activities that foster their general well-being, both physically and mentally. Although reference was drawn from various models of elder learning found in other countries including Britain, France and Australia, the Hong Kong Elder Academy Scheme was claimed by the Elderly Commission as unique with Hong Kong characteristics, which has taken into account the characteristics and needs of the elders in Hong Kong.

With reference to the *Application Guidelines* (Elderly Commission, 2007), the Elder Academy Scheme is found to be unique in various aspects. First, it is district-based with the Commission setting out to establish at least one elder academy in every district. There are 19 districts in Hong Kong, each being a geographical constituency in territory-wide public elections and each having a District Board responsible for the planning and management of district matters related to the livelihoods of people living in the district. Second, it is school-based where existing resources are put to optimal use for elder learning that takes place after school hours and at weekends. The school campuses have the requisite resources and basic facilities required for elder learning programmes and therefore can keep the administrative cost for these programmes to a minimum. Third, it promotes intergenerational learning and interaction between the old and young where courses are taught by young students to the elderly and vice versa. As a result, the interactions facilitate expansion of social networks and promote the culture of intergenerational understanding and rapport. Fourth, it requires cross-sectoral collaboration where different stakeholders – the government, NGOs, schools, tertiary institutions, and elderly community centres – work together to provide a myriad of courses and activities for elders to pursue in their late-life years. Fifth, the government is playing a coordinating role, which is not involved in the offering of courses and running of the academies on an operational basis. Instead, it makes available a lump sum grant to participating schools or organizations which receive the grant as seed money to establish elder academies. The academies are operating on a self-financing basis using the grant to purchase equipment, finance publicity activities and pay for the basic overheads. In addition, elders enrolled in the courses are expected to pay a nominal fee for participation to share part of the administrative cost incurred. Sixth, each

academy is free to design courses and activities that meet the diverse needs of elders with different abilities and socio-economic backgrounds in various districts. Although there are general curriculum guidelines on the kinds of compulsory and elective courses to be offered, each elder academy can decide on the type, level and area of studies for courses they offer to elders in their academy. This aims at resulting in a wide range of courses available, from academic studies to arts, crafts and sports. Also, there will not be any academic barrier, such as entry requirement, or examination, in order to encourage wider participation. Seventh, upon completion of the required number of compulsory and elective courses, elder learners are awarded a certificate at a public graduation ceremony organized by the government. Although the certificate is nothing close to being a formal qualification, the public awarding of certificates shows the commitment of both the government and the elder academies involved to making elder learning a serious matter that is worth recognizing and rewarding.

Critique of the Elder Academies Network

The territory-wide network of elder academies (EAs) is a significant initiative orchestrated by the Elderly Commission. During its initial years of establishment, a network of 78 elder academies was set up in various districts, providing an array of courses for elder learning. To date, the network has expanded to include more than 100 EAs in schools and NGOs, plus 7 EAs in tertiary institutions (Elderly Commission's website). The EA network represents a notable change in government policy and practice in elder learning as compared to the informal and uncoordinated approach to elder learning before the Elder Academies network was established in early 2007. According to the Elderly Commission, elder learning programmes first emerged in the 1980s, with most of them organized by NGOs. This is confirmed by Leung et al (2005), who noted that learning for older persons in Hong Kong started in 1984. Learning opportunities were mainly provided by elderly care centres and social services organizations, and the courses offered were non-credit bearing and mostly personal development in nature (Zhang & Ha, 2001). Examples of these courses include Basic Computer Usage for the Elderly, Elementary English, Chinese Calligraphy, Water and Ink Painting, Dancing and Tai Chi lessons etc. It was also commented by Lee and Chan (2002) that Hong Kong adopted a non-formal approach to elder learning for its elderly citizens in the 1990s.

The growing network of more than 100 elder academies in different parts of Hong Kong offers a suite of educational opportunities, plus facilities and meeting places for the elderly. The network is coordinated by the Elderly Commission with policy and administrative support from the government's Labour and Welfare Bureau, both of which are not directly involved in the provision of educational opportunities and services to the elderly. Though

more coordinated and better conceptualized as compared to the informal and uncoordinated approach to elder learning in the past, the EA network is not without problems that warrant attention and evaluation. Only through rigorous evaluation and continuous improvement can the EA network be enhanced to achieve its significant and important outcomes for active ageing through elders' participation in learning.

The current funding disbursement, which is small and non-recurrent, does not provide the kind of financial stability needed by elder academies for offering and running courses and activities to support elder learning on a regular basis. After receiving the seed money from the government to set up an elder academy, volunteer organizations such as schools, NGOs or tertiary institutions, are left to run the EA on a self-financing basis, charging a fee that is acceptable to the elder learners. With this operational mode, each EA is either heavily subsidized by the volunteer organization or is operated on a market-oriented basis, offering courses and activities that meet the market needs and wants. The need to maintain operation and sustain the provision of relevant courses and activities creates a tension between what should be and what is being offered. Elder academies are facing the dilemma of promoting community-based forms of elder learning that can improve overall quality of life on one hand, and offering learning opportunities that are readily accepted by the market, on the other. Such lack of long-term funding commitment by the government is further evidenced when the Financial Secretary (2009) announced in his *Budget 2009-10* the one-off allocation of $10 million to set up the Elder Academy Development Foundation (EADF) to aim at supporting learning and participation by elders in all sorts of formal and informal educational programmes and activities. Being a far cry from a long-term and recurrent funding arrangement, the EADF has been in the past years allocating short-term funding for projects subject to the merit of proposals and applications submitted by interested organizations or elder academies. The lack of regular and sufficient funding has yielded in the plight of many elder academies trying to make ends meet in order to survive. This has resulted in many EAs being poorly resourced, jeopardizing the quality of provision and restraining their growth in respect of the range of courses and activities to be offered for elder learning and participation.

Most of the courses run by elder academies are targeting elders aged 60 and above and are informal in nature in terms of both content and mode of study. Many courses are mainly interest courses and participation is usually part-time and voluntary. However, courses or programmes for elders run by elder academies in universities or tertiary institutions are linked to their regular offerings, which allow the elder learners to enroll in undergraduate course as auditing students who do not take part in any assessment and do not earn credits for the degree award. Although the EA network emphasizes coordination and cross-sect oral

collaboration, in fact, there is very little communication and cooperation between EAs, in particular, on curriculum matters, resulting in the duplication of offerings and an insufficient range of courses and activities across the territory-wide network of elder academies. And very often, the offerings are limited to addressing the 'wants' rather than the 'needs' of older learners. McClusky (1974) distinguished the difference between 'needs' and 'wants', with the former referring to the essential things for survival and the latter as something one desires to have but not necessary in order to survive. As a result, courses that are wanted by elders for leisure-time enjoyment and for interest have proliferated, and are mainly offered by EAs in schools and NGOs. However, courses that aim to address the educational needs of elders are lacking, providing little opportunity for elders to acquire the kind of knowledge, skills and attitudes needed for a high quality of life and well-being in old age. McClusky (ibid.) proposed four kinds of needs: coping, expressive, contributive and influence. Coping needs are related to how one manages changes brought about by ageing. Expressive needs are needs to engage in meaningful and developmental activities. Contributive needs are the desires to make contributions to others and society. Finally, influence needs refer to the intentions of elders to exert a positive influence on others and the environment. Driven by the market force because of the lack of recurrent government funding, it is natural for EAs to focus their curricula on meeting the immediate 'wants' of the elder learners, rather than providing a range of courses that can address the various fundamental, albeit less immediately felt, needs of the elders to help maintain their well-being and a high quality of life as they age.

Conclusion

Despite the significant growth in size and participation among elders in Hong Kong since the establishment of the Elder Academies network in 2007, there is little information as to the effectiveness and impact of such policy and practice in promoting elder learning. Data and views are needed from the perspectives of stakeholders, including policy makers, service providers and elderly learners, to evaluate how effective the policies have been in encouraging older adults to engage in continued learning, and more importantly, to examine if the range of course offerings is addressing both the wants and needs of elders in order to help them achieve the main goal of active ageing through lifelong learning.

The current funding arrangement, in particular, warrants attention and evaluation. There is a need for the government to review its funding commitment to elder learning to help ease the financial pressure experienced by elder academies and to counter the forces exerted by the market on the curriculum and the range of course offerings made available by the 100+ elder academies in Hong Kong.

For future development, it is essential that the elder academy network be critically reviewed for effectiveness, to ensure that t is meeting the needs and expectations of older people and supporting providers in delivering high quality programmes to elders. To date, there is no evaluation of the Elder Academy network to assess if its goal of promoting active ageing through elder learning is being achieved. Not until it is supported by evidence from research and evaluation can the experience of Hong Kong be shared and the model of the EA network be emulated elsewhere to add to the global understanding of active ageing and elder learning. Active ageing, in its simplest terms, is a strategy to maximize the quality of life and well-being of elders. Through elder learning, it works to promote an appreciation of the different needs, abilities, and contributions of individuals as they progress through their later years. Active ageing requires an environment that is age-friendly and where elders have access to programmes and services that fulfill their needs and interests. In this light, the Elder Academy network, as a strategic form of elder learning, requiring cooperation and joint engagement between the government and various stakeholders, forming a network with a range of schools, institutions and organizations, and developing a multiplicity of offerings, some traditional, some innovatory, some formal and some informal, is wielding the greatest potentials in realizing the goal of achieving active ageing through elder learning.

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