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# An evolving practice model in the development of lifelong education for senior citizens

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**MONOGRAPH SERIES No.16 (June 2009)**

**AN EVOLVING PRACTICE MODEL IN THE  
DEVELOPMENT OF LIFELONG EDUCATION FOR  
SENIOR CITIZENS**

By

SHUM WAI-CHUEN

# **AN EVOLVING PRACTICE MODEL IN THE DEVELOPMENT OF LIFELONG EDUCATION FOR SENIOR CITIZENS**

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# **AN EVOLVING PRACTICE MODEL IN THE DEVELOPMENT OF LIFELONG EDUCATION FOR SENIOR CITIZENS**

**SHUM WAI-CHUEN**

## **1. Introduction**

Promoting productive and successful aging has gradually become a main concern for society at large, in particular, public policy makers, gerontologists and social workers in ageing societies. In Hong Kong, the population aged 60 years and above has increased from 745,500 (13% of the total population) in 1991 to 1,004,400 (14.8%) in 2001 (Census & Statistics Department 2005). This figure will increase to about 2.2 million representing 27.7% of the population by 2023 within a span of about twenty years (Census & Statistics Department 2004). With this rapid growth of the elderly population, greater efforts are urgently needed to prepare for the shift in demographics and the challenges it brings to the Hong Kong society.

The Hong Kong SAR has initiated the concept of “learning for life” (Policy Address 1999) and subsequently changed it to “learning through life” (Policy Address 2000). Yet, this concept of lifelong education, which is widely publicized, tends to be associated more with career development and job training that enhances an individual’s job capability rather than a more holistic concept that encompasses other aspects of learning. A shift in emphasis is needed so that lifelong education can be turned into an effective strategy that

responds to the various challenges of an ageing society such as in the case of Hong Kong. This reorientation in focus in life long education is aimed at enhancing the quality of life of senior citizens.

Hong Kong Sheng Kung Hui Welfare Council (hereafter referred as “the Council”), being one of the largest social services organization in Hong Kong, is committed to develop a more comprehensive package of services that provides care to senior citizens. Based on the motto of ‘Individual Care and Overall Concern’, the Council puts concerted efforts to provide innovative, comprehensive and quality services to the seniors so as to enable them to continue to live in their communities with dignity and happiness.

As early as in the mid-1990s, the Council recognized the importance of lifelong learning in the life of elderly in order to promote productive and successful aging. Hence, the Institute of Continuing Education for the Senior Citizens (hereafter referred as the Institute) was established in 1998 for the promotion of lifelong education for the seniors in Hong Kong.

Lifelong learning is believed to be essential for the success of actualizing the spirits of “productive ageing”, “healthy ageing” and “successful ageing. Responding to the increase in gray population, the Hong Kong Sheng Kung Hui Welfare Council established the Institute of Continuing Education for senior Citizens in 1998 in order to meet their increasing need for learning. This paper chronicles the development of the Institute, explains its rationales,

curriculum focus and delivery. In addition, it discusses in detail the recent development strategies adopted by the Institute to enhance elderly participation and empowerment in the process of lifelong learning. Two specific actions are taken, namely, formation of student unions and promoting elderly participation in classroom teaching and learning for capacity building and empowerment.

## **2. Institute of Continuing Education for the Senior Citizens**

Since September 1998, the Institute has been working diligently towards developing comprehensive courses and activities for senior citizens. These activities and courses are to enable them to achieve the objective of life long learning which ultimately is focused on achieving a successful, productive and healthy ageing. The objectives of the Institute are as follows:

- To provide senior citizens with various learning opportunities
- To equip them with the proper attitude, knowledge and skills so as to enable them to adapt to living
- To enable them to develop their potentials and to lead a productive, dignified and meaningful life
- To promote the concept of “Productive Aging” and “Late Life Learning” among elderly people as well as to the general public.

The Institution targets Hong Kong citizens aged 50 years and above. Since its inception, the number of training centres and registered students continue to grow and recently the number of centres and students has reached 30 and 3,800, respectively. The Institute offers a total of about 1,200 classes with over 130,000 students in the 2004-05 academic years.

### **3. Background**

#### *Successful Ageing*

Successful aging is a complex concept. Some scholars regard successful aging as closely related to one's healthy living while others offer alternative views. According to Whitbourne (2001) successful aging is synonymous with "mental health" in that the qualities thought to be desirable for optimal adaptation, such as a positive outlook and greater self-understanding, are also part of the criteria for successful aging. Whitbourne continues to elaborate that the notion of successful aging is related to subjective well-being, an individual's overall sense of happiness. The concept is further divided into three components: positive affect, negative affect, and life satisfaction, or the cognitive evaluation of one's life circumstances (Whitbourne 2001: 429). Many researchers examine successful aging in a psychosocial perspective to include both objective and subjective criteria. Baltes and Baltes (1990: 5) suggested using variables such as mental health, cognitive efficacy, biological health, length of life, social competence and productivity, personal control, as

well as life satisfaction to measure successful ageing. According to Rowe and Kahn (1998), successful ageing is the ability to maintain three key behaviours or characteristics:

- Low risk of disease and disease-related disability
- High mental and physical functioning
- Active engagements with life - relating to others and continue engaging in Productive activities

### Productive Ageing

The concept of productive aging has been defined differently from economic, social and psychological perspectives. The Institute maintains that to be productive does not necessarily means that elderly people are to be placed in the labour market, competing with younger adults for paid employment. The Institute however emphasizes more on the social and psychological aspects of productive aging. The concept of productive aging is defined in terms of meaningful engagement. From this perspective, through learning and knowledge development, elderly people will collaborate with others, develop abilities to cope with their life problems and difficulties, and also contribute to the well-being of others in both passive (remain independent and self-sufficient) and active (help others to cope) manner.

### Healthy Ageing

The World Health Organisation (WHO) defines health as a state of physical, mental and social well-being and not merely the absence of disease or infirmity (WHO 1999). Health is seen as a cumulative state and needs to be promoted throughout life in order to ensure that the full benefits are enjoyed in later years. Good health is vital to maintain an acceptable quality of life in older individuals and to ensure their continued contributions to the society. As a matter of fact, in order to promote the concept of Healthy Ageing in Hong Kong, the Elderly Commission and its Committee, with the support of the Health and Welfare Bureau and concerned departments, had taken the lead to explain the concept and the strategies to the community and service providers, so as to initiate community wide discussions on Healthy Ageing in 2001. A three year territory campaign was subsequently launched.

### Learning for All – The Right to Learn for Senior Citizens

In the World Assembly on Aging held in 1982, the concept of continuing lifelong education for the elderly was officially adopted by the United Nations as one of the basic human rights. It is widely believed that by giving the elderly a chance to learn in their later life is a logical move to promote the quality of life of the elderly as well as to increase the opportunity to achieve successful aging among them. Elderly people, just like other adults, should have equal opportunities and rights for personal growth, learning and

development (c.f. Weaver 1999). Although Chinese elderly people are usually treated with respect under the traditional Confucius values, they are not expected to play an active role in the society through learning or other similar productive engagement. Nevertheless, given that elderly people are living longer and healthier live, it is important for them to acquire essential knowledge and skills in order that they can maintain independence and continue to participate in the communities. Lifelong education provides the elderly with different opportunities to acquire knowledge in different areas such as arts, sports, music, practical knowledge in daily living, information technology, and so on. As a result, they can lead an enriched and a meaningful spiritual and social life, and in turn contribute towards the development of society.

#### *Learning Needs - Specific Goal and Scope of Late Life Education*

McClusky (1971) generally known as the father of education for older people has contributed significantly in the classification of the needs of the elderly:

- *Coping needs* - minimal literacy and self-sufficiency levels; through learning, seniors can be empowered to meet the daily living requirements and solve the problems encountered.
- *Expressive needs* - activity carried out for its own sake; time is usually required by each person for some expressive activity which makes him feel gratified.

- *Contributive needs* - altruistic desire to serve others; through learning, seniors can remain as productive members of the society and maintain their self-worth.
- *Influence needs* - desire for political skill and wisdom so as to participate and contribute themselves in the development of the society.
- *Transcendence needs* - rising above age-related limitations; learning to lead a meaningful life

McClusky also called for intergenerational interactions to promote education and learning in later years. It is based on the assumption that, although separated by time and experience, each generation nevertheless has a common stake with other generations in relating the wholeness of the life-span of which it is a part (McClusky 1978: 50-51). Differences will naturally exist between generations because of varying values, beliefs, and experiences, but such differences only accent the need people have of learning from one another (Hiemstra 2002).

### *Educational Needs and Wants*

Peterson (c.f. Wong 2004) had distinguished educational needs and educational wants among the elderly. Educational needs refer to the things that professional experts believed the older learners should have, while educational wants refer to the preferences or desires of the elderly learners. Hence, in developing the courses, apart from adopting McClusky's theory of learning

needs, the seniors' felt needs and expectations are also taken into consideration. .

#### **4. Learning at the Institute: A Learning Model Emphasizing Experience and Practice**

The Institute believes that late life education should play an important role in enhancing life skills and capacities of older people. Such an educational strategy demands a much broader approach that goes beyond the traditional academic model, which usually emphasizes intellectual and literal abilities. This strategy will focus on experiential learning that builds on practical life experiences. Considering the lower educational level and limited audio-visual ability of most of our elderly persons, the curriculum design and course delivery should emphasize completion of simple tasks and understanding of basic skills through observations, experiences and practices.

To enable the senior citizens to lead a productive and fulfilled life, the Institute responds to the learning needs and rights of elderly people. Late life education has its unique characteristics so that the curriculum design, the course delivery model and the development of teaching materials should be tailored to the learning mode and needs of older people. We believe that late life education should play an important role in enhancing life skills and capacities of older people (coping), relating with others (communicating), meeting their own goals of development (growing) and helping them

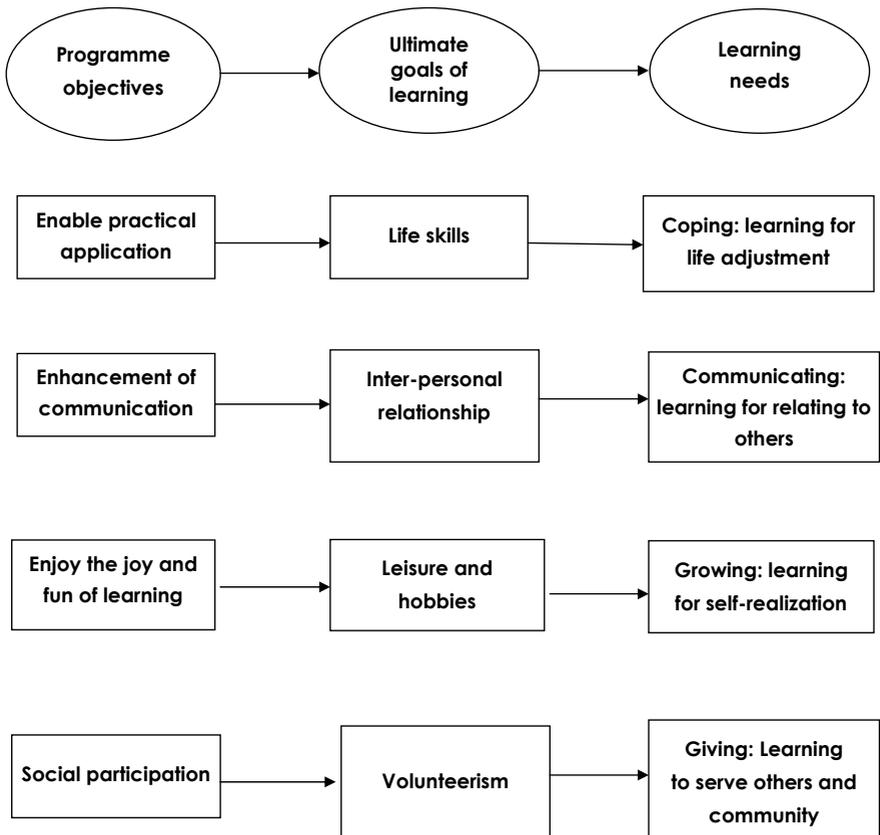
contribute to the society (giving). These specific foci demand a much broader approach in curriculum design and delivery that goes beyond the traditional academic model, which usually emphasizes intellectual and literacy abilities. The Institute has taken the experiential learning approach with emphasis on the completion of simple tasks and learning basic skills through observation, experience and practice. Emphasis is placed on learning for continuous participation and engagement in different social contexts and activities. The course delivery model and the development of teaching activities and materials should respond to the learning needs and wants of older people.

The four foci of elder learning based on the experiential approach are as follows:

- Coping skills which involves learning for practical life skills such as information technology knowledge, adapting to retirement, health education and disease prevention etc.
- Communication skills that incorporate learning for harmonious interpersonal and inter-generational relationships.
- Growing includes learning to achieve self-realization, to embrace positive outlook and lead a dignified golden life.
- Giving refers to skills learning and developing a positive attitude towards serving others and the community

The figure below shows the relationships between learning needs and programmes foci as identified by the Institute.

Figure 1: Characteristics of the Education Programmes at the Institute



### *Curriculum, Faculties and Departments*

The Institute is made up of three faculties. Under each faculty, there are various departments providing different courses. For details, please refer to Appendix A. The development of the Institute in relation to elderly participation can be divided into two stages: Development Stage (1998—2004) and Participation Consolidation Stage (2004 onwards).

Prior to 2004, Institute of Continuing Education for Senior Citizens (ICESC) is at its developmental stage. The model used by the Institute, to a large extent, can be described as the Community Education Model. At this stage, efforts were made to build the capacity of the elderly people to participate more in the Institute. For instance, training courses were organized to equip the elderly people with relevant teaching and tutoring skills so as to mobilize them to become course instructors and tutors. However, the bulk of administrative work of the Institute was carried out by paid employees of the Council.

Consolidation Stage (2004 onwards) - the success of the earlier phase brought development to another level where a paradigm shift in the delivery mode was introduced. The principle of enhancing elderly participation was formally adopted as one of the strategic direction of the Institute. To this end, two specific strategies are employed and they are: formation of student unions and enhancing elderly participation in classroom teaching and learning. There are three main reasons for this significant change:

### Emergence of the “Third Age” Population

Hong Kong has a rapid ageing population. It is expected that from now on, the soon-to-be-old would be more educated compared to the present cohort of elderly. They would be healthier and have longer life expectancy with the advancement of medical sciences and better health care services as well as greater health consciousness. As such, the soon-to-be-old would have greater interests in elderly learning and the capacity in performing the productive roles in contributing to the welfare of others.

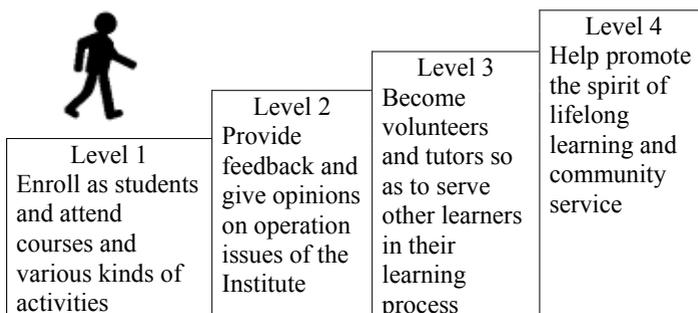
### U3A (University of Third Age) Movement

The development of the U3A (University of third age) movement is encouraging (Swindell & Thompson 1995). U3A are institutes where learning activities for the seniors take place. At present, two distinct approaches to U3A have been adopted by different countries. The earliest U3A originated in France in 1973. In this French model, the U3A collaborates with universities where learning activities for retired persons are organized. In contrast, the British model emphasizes self help learning and self-governance with active participation of elderly as students, course leaders, course coordinators and office administrators, etc.

### *The Asset-based Community Building Approach*

As put forth by Kretzmann and McKnight (1993) *the Asset-based Community Building Approach* emphasizes the strength and capacities of citizens and associations within a locality for community building. It sees community members as active change agent rather than mere service beneficiaries or clients. Indeed, it represents a shift of paradigm from needs-based to capacity focused approach. Whilst the former is top-down approach, focusing on deficiencies or problems; the latter is a bottom-up approach, focusing on the capacity building of the community members for positive changes. Taking this approach in the context of elderly learning, elderly students are seen as assets with potentials. Greater degree of their participation is believed to be beneficial to themselves, the Institute, other elderly and the community at large. In other words, the elderly are empowered and the Institute believes strongly about empowerment of elderly. It is seen that elderly participation can take place at different levels as shown in Figure 2. At the most basic level the elderly can participate by enrolling in the courses offered by the Institute. They could progress to provide services to others with respect to operation issues. At the top most level, they will help to promote the concept of life long learning and serve the community.

Figure 2: From Novice to Instructors



In view of the different possible levels of participation, the Institute plans to intensify seniors' participation in every step of the learning process as a growth strategy. To achieve this, two strategies have been adopted. The first strategy is to develop courses and to organize activities. Under this strategy, the Institute is to set up a students' union to mobilize students to participate by giving inputs and assisting the Institute with the day-to-day work. The second strategy is to implement training the trainer programme.

### Strategy 1: Setting up Student Unions

To achieve the first strategy, in November, 2004, ten students' unions were set up at the Institute and learning centres. The functions of the Union are as follows:

1. To promote the spirit of lifelong learning and serving the community and the public at large
2. To enhance students' sense of belonging to the Institute
3. To encourage interaction and communications among the students
4. To forge networking between the Institute and other community organizations, especially those providing elder education
5. To create a pool of volunteers in assisting in the operation of the Institute
6. To raise opinions and give suggestions on matters relating to the operation and development of the Institute.

In the year 2004 and 2005, over ninety students registered as Committee Members of the ten Unions. For each Union, the Institute appoints a staff member to be the Executive Officer to work alongside members of each Union. Throughout the year, activities carried out by the Union include (i) publication of Student Union Quarterly Bulletin, (ii) Lunar New Year students gathering, (iii) picnic, and (iv) visits to training centres for sharing experiences, views and opinions about best practices for running a students' union.

### Strategy 2: Classroom Teaching and Learning

The second strategy is to promote training the trainer and participation in classroom teaching and learning. Since 2003, the Institute has been organizing training courses for the seniors who are interested in becoming tutors or instructors at the Institute. This was in line with the concepts of productive

ageing, self-help learning, hierarchy of elderly participation as well as the Asset-based Community Development Model. This model emphasizes the strength and capacities of the citizens and associations within a locality for community. The students are mobilized to become tutors, instructors and mentors so as to serve and help other seniors in learning. The Institute is concerned about the effectiveness of this approach and several questions were asked: Can the students benefit from this kind of approach? What are the conditions that may facilitate this kind of teaching and learning? A survey was conducted to find answers to these questions. The research results serve as inputs to the strategy development for the future.

## **5. Evaluation on the Functions of Students' Unions**

A survey was conducted in 2005 to obtain feedback from the Committee Members of the Unions. A questionnaire was distributed to all the committee members (n = 102) in which 92 of them (90%) were returned and analysed. The majority of them (70%-85%) agreed with the purpose and functions of the union, which are to promote interactions among students, to enhance students' sense of belonging and to serve as a platform for students to voice their opinions and give suggestions for the development of courses and conduct of activities.

### Functions of the Union

Slightly more than half agreed that the union is able to enhance the students' motivation of learning and provide the students with more information. A total of 73 respondents (72%) felt that the union is able to communicate and bring their concerns and opinions to the Centre, 70% thought that the union is able to conduct activities for the students while 61% felt that the union is able to influence or convince the Centre to introduce more courses that are suitable for them.

### Benefits and Concerns

The majority of the respondents provided positive feedback with respect to the benefits they gained from their participation. More than 85% of them agreed that they have learned more, understood the concept of elder education better, made new friends, developed confidence, and were able to communicate better in terms of interpersonal communication and voicing opinion and giving suggestions. All the benefits gained contributed towards their personal growth thus, enhancing their self-esteem.

Whilst acknowledging the benefits of participation, the respondents expressed concerns. Although members felt that they have gained confidence, about three quarter of them remained apprehensive about their capability to perform the role entrusted on them. Slightly more than 50% were concerned about the

scheduling of classes and meetings as they would want to participate in both. About one third expressed the high traveling expenses incurred in order to attend meetings and classes. Only about one quarter said they faced deteriorating health.

Based on the positive feedback, the institute will continue to strengthen the operations of the union to further provide benefits to members and at the same time overcoming some of the shortcomings.

## **6. Evaluation of Information and Computer Technology (ICT) Programmes and Zone of Proximal Development (ZPD)**

The ICT courses are some of the courses that have been successfully implemented. A wide variety of ICT courses, such as basic computer skills, word processing, design of web pages, photo processing and assembling computers, are offered. A research project was conducted jointly with Dr. Ng Chi-hung, Lecturer, Open University of Hong Kong, in the four-year period from 2000 to 2004 targeting ICT courses at the HK Sheng Kung Hui Western District Elderly Community Centre. The main purpose of the project is to understand why and how elderly learn ICT, the learning outcome, and how knowing ICT has changed their life. In addition, factors that contributed towards their success in learning are also investigated.

In order to obtain data for evaluation, several methods of data collection were employed. The data consist of field notes, interview scripts, video excerpts, recordings of lessons, surveys, and samples of work (including digital photos, websites, etc). The research project started off with in-depth interviews with 10 core members of the ICT courses who were students of the first cohort. To verify these initial findings, another 30 students were interviewed. Among them 10 were experienced ICT learners, 10 dropouts and 10 non-participants. In order to triangulate the interview findings, different methods of data collection, such as casual and formal observations, interviews with ICT learners of other training centres, were adopted. Several consistent findings can be drawn from these diverse sources of data:

1. Elderly people's motivational and learning patterns in these computing courses are developmental in nature. They started with a lot of worries, concerns and mis-beliefs, which were eventually overcome with joy, interest and engagement.
2. Different kinds of socio-cultural factors have facilitated their learning, which is in itself a development process. These factors can be broadly classified into general social supports and classroom supports. The general social supports include supports from family members, friends and the general social values attached to computing skills. The classroom supports are generated from the interaction between teachers and students. Teacher support includes the use of appropriate teaching methods, clear

guidance, offering help, and designing an interesting course. Classmate support includes help from each other, sharing of notes and learning materials, sharing of knowledge and other related information.

3. Older adults generally concurred about the skills and knowledge gained from learning ICT while they also expressed the joy they derived from learning, fostering relationship with other people, sharing computing knowledge with friends, introducing friends to computing classes, visiting computer exhibitions and book shows, and the development of a sense of social cohesion.

Overall, the research results show that learning ICT skills and knowledge has enabled older adults to learn new ways to cope with their life demands, helped them develop their personal interests and equipped them with new means to communicate with their family members and friends, and finally helped them to contribute to the well-being of others.

One of the major challenges of this project is to design an effective curriculum and adopt an appropriate pedagogical that could help the ICT students to learn successfully. In order to achieve this, the following facilitative conditions related to the notion of Zone of Proximal Development (ZPD), an idea suggested by Cole in 1962 and expanded by Vygotsky (c.f. Cheyne & Tarulli 1999) are identified:

- a. Participation in Curriculum Development - to involve the learners in making various decisions relating to curriculum development and course delivery.
- b. Learning Tasks - learning tasks are structured and broken into small and manageable bits. Important steps are highlighted and ample practices are given to learners.
- c. Tutor Support - tutors' assistances in the form of demonstrating computer skills, guiding students in completing complex computing procedures, troubleshooting problems and acting as a resource person, provide effective support to students.
- d. Peer Tutoring - capable or experienced learners offer guidance and help new learners. However, there are problems associated with the implementation of peer tutoring which include: some experienced learners considered the idea as an opportunity for some to be pretentious and too egoistic; some did not feel confident enough to take up the role as tutor. It is hoped that training provided to tutors will help them to overcome the problem faced.
- e. Collaboration - collaboration can take the form of learning together, such as share and help others during the sessions; and or practicing skills together.
- f. Connection - service opportunities are provided to enable learners to practice and utilize what they have learnt to serve the community.
- g. Sharing of Work Accomplished - the achievements and work of students who have completed the course are usually shared with the public and

those who are new. Dissemination of students' work is most frequently exhibited in open exhibitions where their works such as painting, handicrafts, Chinese calligraphy were shown. In carnivals they set up game stalls introducing seniors' learning.

The above discussions highlighted some effective conditions that could contribute to the success of learners and the development of a learning community. These conditions are actually related to the notion of Zone of Proximal Development (ZPD), an idea suggested by Cole in 1962 and was expanded by Vygotsky (1978, c.f. Cheyne & Tarulli 1999) and developed it as a practical theory of teaching and learning. ZPD describes the gap between one's actual level of development or performance and his or her potential level of development or performance under the assistance of or in collaboration with more capable peers. ZPD signifies the importance of instruction and guidance, and scaffolding i.e., teacher serve as models to students in behaviour, students imitating teacher's behaviour, teacher fades out instruction and students practice reciprocal teaching. The employment of these facilitative instructional practices can effectively meet the needs of the learners and open up their ZPD as well as to extend their self i.e the development of new identities and the connection with current group of learners and other communities that can be conducive to community coherence and integration. The findings pointed out that whilst it is good to enable the elderly to become instructors and tutors, students' active participation in the learning process is equally important.

## **7. Conclusion**

The findings of the two studies show that empowerment of the elderly in the learning process also enhances their participation at both the courses and activities organization level as well as the classroom teaching and learning level. This approach is beneficial to the learners themselves, other learners and other community members as well. In adopting this approach, empowerment is an important element that facilitates the entire process of teaching and learning. The empowerment strategy is consonant with the characteristics and expectations of the soon-to-be-old in Hong Kong. Hence, the Institute will continue to adopt this kind of participatory strategies in its lifelong education process in the future.

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## Appendix A

### Organization of the Courses

Faculty	<i>Department</i>	Course
Arts	Chinese, English, History, Geography and Environment, Religion.	Chinese Language, English Language, Chinese History, Environmental Protection, Religion and Philosophy
<b>Sports and arts</b>	Music, Drama, Arts, Dance, Art of Living, Sport & Games, Physical Exercises, etc.	Chinese Opera, Drama, Chinese Drawing, Calligraphy, Handicraft, Photography, Social Manners, Fitness Dance, Tai Chi, Table Billiard, etc.
<b>Social Science</b>	Social Service, Civic Education, Psychology, Health Education, Information Technology, Life Education	Volunteer Training, Health Care and Nutrition, Civic Rights and Obligations, Social Psychology, Information and Computer Technology Learning, Life-education

## **Asia-Pacific Institute of Ageing Studies (APIAS) at Lingnan University**

### **HISTORY**

The Asia-Pacific Institute of Ageing Studies (APIAS) was established as a University-wide institute in 1998 and has been operating as one of the research centers in the Institute of Humanities and Social Science (IHSS) since September 2001. The mission of APIAS is to facilitate and develop research in gerontology and issues related to population ageing in Hong Kong and the Asia-Pacific region.

### **OUR MISSION**

“To develop a better environment for older people and their families in Hong Kong and the Asia-Pacific region.”

### **OUR OBJECTIVES**

- To develop an area of research excellence in programme evaluation and action research; both quantitative and qualitative research methodologies.
- To strengthen our collaboration within the Lingnan University and the local communities, particularly in relation to student learning.
- To strengthen the collaboration and network amongst the Asia-Pacific region.

For further information on APIAS and opportunities for research collaboration and affiliations with the Centre, please contact us :

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