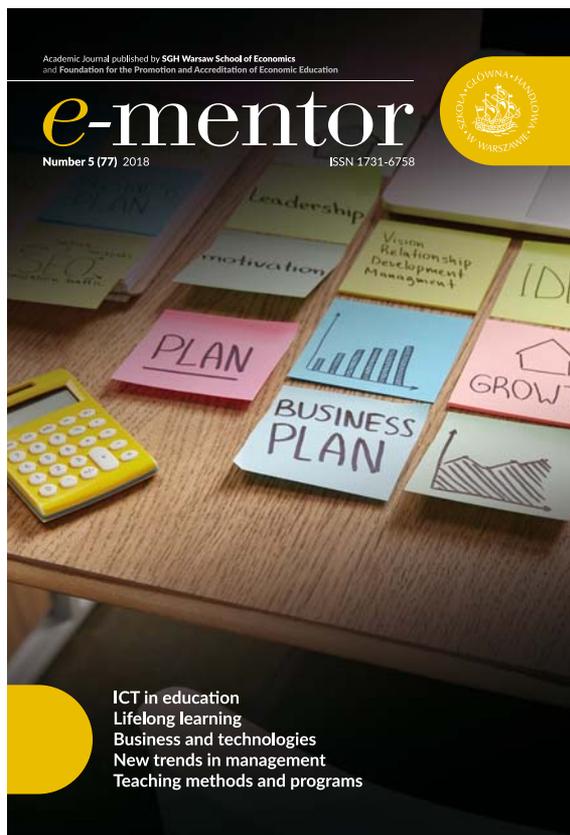


e-mentor

DWUMIESIĘCZNIK SZKOŁY GŁÓWNEJ HANDLOWEJ W WARSZAWIE
WSPÓŁWYDAWCA: FUNDACJA PROMOCJI I AKREDYTACJ KIERUNKÓW EKONOMICZNYCH

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The University of the Third Age in Poland. A Democratic and Holistic Approach to the Education of the Elderly

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The literature on the subject provides a relatively large amount of work describing various models of the University of the Third Age (U3A), such as French, British or Chinese. Numerous accounts of the functioning of educational institutes for seniors in Poland have also appeared but the attempts to distinguish and classify the characteristics which define the originality of the Polish model are scarce and insufficient (Halicki, 2000). A more extensive examination of global achievements in the education of seniors, as well as a more in-depth analysis of the Polish solution, leads to the conviction that it is worth pursuing a definition of the Polish model of the U3A.

In this article the author makes an attempt to define and describe the distinctive features of those education institutes for seniors which call themselves the Universities of Third Age. Starting with an account of the inspiration for the concept of the Polish U3A and its subsequent development, the author goes on to analyze such features as participation, syllabus, management and sources of funding.

The author's conclusions are based on almost twenty years' experience of the cooperation with Polish U3As operating within the Lower Silesian Federation of U3As, as well as with policy makers both from the local government and EU institutions regarding adult education and activation of the elderly. However, the fundamental knowledge about the development of the institutions of that type comes first and foremost from the author's experience on the position of the Director of U3A at the University of Wrocław.

Introduction

Academics involved in the question of education for seniors generally connect the creation and development of U3As with the rise in an aging population (Yenerall, 2003). This approach appears to be unsubstantiated because in the 1960s we were dealing with only the beginning of demographic change, and in 1975 when the first U3A in Poland was established there was even a significant rise in the birth rate (Kielkowska, 2018, p. 71). Observing the development of U3As today, one could come to the conclusion that their inauguration and rise result from individual

needs, i.e., defined by the seniors' leaders and self-governments of the U3As rather than social needs connected with the policy and interests of institutions. If the state were interested in maintaining the U3As, it would allocate the appropriate funding whereas the rise and development of U3As most often results from the engagement of leaders and groups representing local community. Such were the origins of the U3A, and to a large extent that is their strength today. This leads to the theory that the driving force of the U3A arises from the needs of elderly students (the British model) or the needs of various educational providers (the French model).

However, in these cases the role of leaders is just as relevant as the needs of the students and the institution. For example, the charismatic directors of the first Polish U3As guaranteed stability, strength, and a precisely defined mission in organizing those institutions. In the case of Wrocław (to which the author will constantly refer in this article), this was evident in the activity of Alina Woźnicka, one of the first directors of the U3A. Thanks to her, the institution was able to survive not only the period of Martial Law but also organizational changes and financial difficulties. In comparison, those U3As which were formed in Wrocław after 2006 faced a constant battle with various kinds of staffing and restructuring problems, and frequent changes in management. The U3A at the University of Wrocław itself had to tackle a similar problem after 2016, when a director without appropriate experience was appointed, and who eventually resigned after only one year in the position. Other universities in Wrocław (e.g., U3A at the Economic University and the Lower Silesian University) faced similar problems from the very beginning. Unable to find the proper leaders and create effective self-governments struggled with establishing the structure and lectures.

The genesis of the Polish U3A concept

Since the very beginning the idea of the Polish U3A has been motivated by the furtherance of self-help.

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The University of the Third Age in Poland...

This indicates a certain duality from the beginning. On the one hand, the need and desire for education came from the seniors themselves, and on the other hand, the same community had to find leaders who would have taken upon themselves the responsibility of first implementing and then organizing the whole enterprise. That was a very difficult task because, apart from conciliatory skills, the leaders had to have many other character features, such as authority and leadership, ability to combine theory with practice, whilst having bold concepts and visions of the possibilities of the local community.

In Poland, the initiators of change were first and foremost pedagogues and representatives of the medical profession. Therefore, the first Polish U3As were intimately connected with medical and educational professional groups:

- in 1975 Halina Szwarz (Professor of Medicine) founded a U3A at the Medical Centre for Post-graduate Education in Warsaw.
- in 1976 Czesław Kempisty (Doctor of Medicine) organized the Third Age Studium at the Trade Union Workers' University in Wrocław. After a few years the Studium was renamed the University of the Third Age (Bilewicz, 2001).

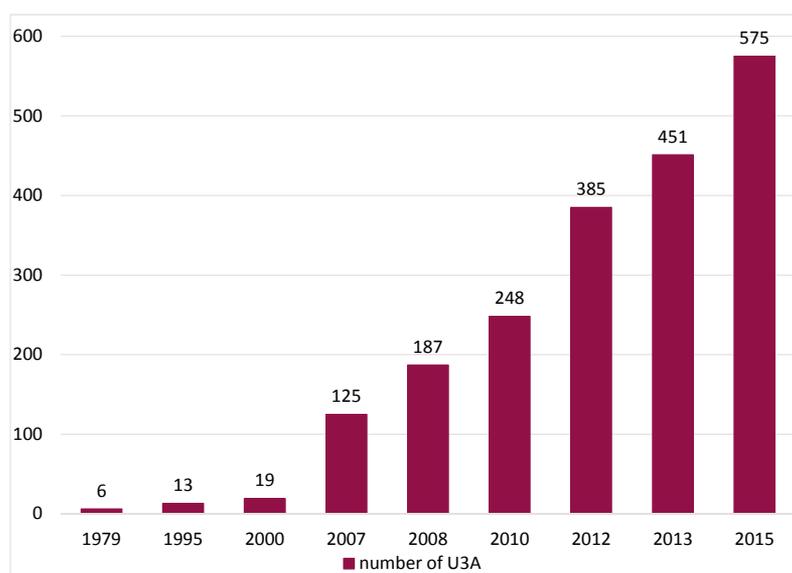
Both Halina Szwarz and Czesław Kempisty, with first-hand experience of the war and occupation, were particularly sensitive to the needs of elderly people damaged by history. Szwarz had been imprisoned and tortured by the Gestapo, and Kempisty had been a prisoner in Auschwitz. Whilst preparing a book to celebrate the institute's fortieth anniversary Dr. Anna Sokołowska conducted in 2015–2016 conversations with the oldest students at the Wrocław U3A and studied the archive material. The analysis of what she had collected led her to conclude that the fundamental

aim of founding the Wrocław U3A was to take care of the physical and mental health of the generation who had survived the war. Unfortunately, the book was never published due to a change in the management of U3A.

It should be remembered that when these first U3As were established, Poland was still behind the Iron Curtain, and international cooperation was strictly limited. It could only happen upon the consent of the Communist Party and was strictly controlled, as was any information emanating from the West. However, it should also be appreciated that, despite these limitations on the exchange of ideas, one of the first U3As in the world was established in Poland, years before the British, Australian, Chinese or American models of education for seniors were initiated. However, it should also be admitted that the activities of the British Open University and American Elderhostel were older and inspirational. On the other hand, this lengthy isolation probably caused that the education of the elderly in Poland has its own character, without copying foreign models, and at the same time addressing local conditions and possibilities. That influenced the later development of the spoken institutions as well as their flexibility and disposition to experiment.

Analysis of the implemented regulations allows to state that from the beginning the U3As were inclusive because the only requirements for participation were age, a clear expression of willingness to learn, and a commitment to take an active part (Bilewicz, 2007). This mission of activeness, related to M. Grundtvig's concept of the school as a place for all who wish to improve themselves (Pierścieniak, 2012), is still cultivated today at the majority of Polish U3As. In recent years, inspired by the free market, the concept of the

Figure 1. The number of U3As in Poland in the years 1975–2015



Source: author's own work, based on Konieczna-Woźniak 2001, the National Statistical Office 2016 and 2018, and the archives of the U3A at the University of Wrocław.

U3A as a profitable organization with high education standards, with a complete system of certification and accreditation, has also come into being. This trend has been introduced on a large scale by the Federation of U3As.

The growth rate of U3A in Poland

In the development of the U3A different periods may be identified. These periods relate to the establishment of new U3As, stimulated by political and demographic changes.

The graph in Figure 1 reveals two important trends. Up to the collapse of communism in 1989, there had been only a few U3As in Poland, and they had been necessarily connected with higher education institutes or medical or social care institutions. Thus, it is possible to say that they followed the French model. However, such a conclusion would be erroneous if taking into account the essence of their activities, because from the start they had been created with significant input from adult students themselves, thus resembling the structure of U3As in Holland (Hug, 2010).

A significant increase in the number of U3As occurred after the collapse of communism in 1989, with the number of senior students doubling every few years, so that by 2015 there had been more than 500 independent educational institutes catering for more than 150,000 elderly students (Piłat, 2014). The connection between the rising number of U3As and political change is quite visible. Thanks to liberation from communism, Poles could take the initiative, and by working together create various non-governmental organizations, including U3As.

The breakthrough year came in 2007 when more U3As were established than during the whole period of the preceding 25 years (*Zoom na uniwersytety trzeciego wieku*, 2012, p. 16). Analysts indicate that this was connected with:

- significant demographic change (between the years 2000 and 2010 the number of retired people increased by 1.8 million);
- opportunities for financial support (for example, the Polish-American Freedom Foundation announced a competition for grants for U3As).

The lifestyle also changed, and there was a significant rise in the number of non-governmental organizations which had the opportunity to seek funds, including for the education of seniors. The rising ambitions of local communities also remained not without significance. They perceived the prospering U3A as an elite form of education with the possibility of adapting it for their own needs with a relatively small amount of effort.

After the year 2000 many well-educated people, who had graduated in the 1960s during the first wave of mass university education in Poland, became eligible for retirement. That group of people was seeking new possibilities for self-education and development as well as a positive way of spending their free time. As a result, they either joined existing U3As or crea-

ted the new ones. Despite the fact, that the group was relatively small (only a tiny percentage of the population had a degree in the 1960s), after the year 2000, they gradually began to dominate, at least in some U3As. Thus, at the U3A in Wrocław, since the year 2000, the number of elderly students with higher education started to systematically rise to account for more than 50% of the total in 2005 (Bilewicz, 2007).

Participants

The average student of the U3A in Poland is a woman aged 65–70, with secondary or higher education, living in a large or medium-sized city (*Zoom na uniwersytety trzeciego wieku*, 2012). In this respect, the profile of Polish U3As does not differ much from other institutions of the same type in Europe and other parts of the world (Patterson et al., 2016; Williamson, 2000). In all the U3As known to the author, the percentage rate of men does not exceed 10%, although research shows that in Poland the national average is closer to 15% (*Zoom na uniwersytety trzeciego wieku*, 2012).

The feminization of the U3A results from:

- the higher death rate of men; The difference can be spotted as early as at the age of 35 and becomes even greater among those who have just retired;
- the lower retirement age for women (5 years earlier);
- different ways of spending free time by men and women;
- more interest in education expressed by women; therefore, they treat the U3A as an opportunity for self-realization and personal development.

The majority of Polish U3As accept retired people over the age of 60, but because of ill-health many of them leave after reaching 70. However, the institutes are well-prepared to cater to those of the fourth age – who are 80 and older (Formosa, 2014; Klimczuk, 2013). Some authors also point to other limitations, such as the lack of educational opportunities for those who are passive and dependent and are marginalized because of poor health or illness (Szarota, 2014). Thus, the more emphasis on elitism and 'the market,' the more the activeness mission is threatened (Marcinkiewicz, 2011).

The first U3As in Poland were established in the largest cities, and it was not until 2000 that initiatives of education for seniors began to appear in smaller towns as well. At the same time, the number of U3As in the first was systematically growing. That may seem obvious because the big cities have more resources as for students, staff, and study centers, which are essential for the proper functioning of a U3A. Thus, in those cities, there is currently a fair number of U3As. For historical reasons, the highest number of them is in Warsaw and Wrocław, where the whole movement started.

Because of the aforementioned dominating location of U3As in the cities which already are academic centers, and since their students are well-educated

The University of the Third Age in Poland...

people, it allows us to conclude that it is an elite form of education. A more in-depth analysis, however, shows that this conclusion is somewhat unfounded. It is possible to define U3As in Poland as elitist only in the sense that barely 3% of retired people benefit from them, according to the statistical data from 2015. There are practically no formal barriers in applying to study at Polish U3As. They accept almost everyone who is over 50 years of age and who has paid a relatively small enrollment fee (generally from 20 to 100 PLN which is the equivalent of 5 to 25 Euro per year). Of course, there are a few exceptions to these rules. Overrepresentation of students with secondary or higher education (more than 40% in both cases) results from the fact that well-educated people already have a pro-education approach developed at previous stages of their learning, which is the basis of andragogy. Apart from this, only a small number of U3As require a certain level of education from candidates as a precondition for entry.

In the vast majority of cases, it is the older students themselves who create the strength and position of their U3A. The syllabus and the extent to which the institution is able to satisfy the educational needs of its members depend on the individuals who later become the leaders. In research concerning the U3As, one can find reference to a 'golden proportion' of 20:80, which in this context means 20% actively engaged and 80% passive participants (Zoom na uniwersytety trzeciego wieku, 2012). Drawing on the experience of the Lower Silesian Federation of U3As and the observation from the U3A in Wrocław, this proportion seems to be derived from the statements of the participants themselves rather than from the objective and defined factors. According to the data collected by the author, in those U3As which are based on the Polish model and the author has had contact with, the number of individuals engaged in creating an active educational community for seniors does not exceed 10% (Kobylarek, 2010).

When discussing the role of volunteers in the development of the Polish U3A, it bears noting that much of their success is based on an intergenerational factor. Many of the volunteers engaged in providing or organizing lectures are undergraduates, Ph.D. students and junior lecturers, who share their scientific interests with the older generation. Their presence is perceived as an additional factor in motivating seniors to take part in activities because they can become familiar with the language, customs and values of the younger generation in a pleasant atmosphere. This model of intergenerational cooperation was particularly promoted in the Wrocław area from 2006 to 2016 and became the pattern for subsequent U3As established in the region.

Syllabus

The syllabus of Polish U3As depends on the needs of the students themselves and the availability of lecturers. The oldest and most active U3As even have

their own student councils to ensure an appropriate balance between various types of lectures. In larger academic centers, the U3As are more often affiliated with a higher education institution or operate in close connection with universities, renowned experts and specialists in a particular field, or the retired professors. In smaller towns, the U3As find their staff among intellectuals or other prominent individuals from the local community – politicians, theologians, doctors, teachers, lawyers, journalists, and artists. Almost all U3As also encourage volunteers from amongst their own members, who create their individual and unique program, and then give lectures for the others based on it.

Such a diversity of lecturers is bound to influence the syllabus. The basic propositions are typically academic activities – lectures, discussion groups, and teaching foreign languages. The second type of activity is connected with physical culture. These activities most often include general exercises, such as gymnastics, as well as specialist exercises for people with blood circulation or mobility problems. The third type comprises workshops in such subjects as computer skills, literature, journalism, painting, theatre, and crafts. The final group consists of intergenerational activities, i.e., sections aimed at organizational issues, mutual cooperation, voluntary work, an ethics committee, student council, sports competitions, and excursions.

Activities are individual by nature and are adapted to the specific audience of students with varying degrees of education, preparedness, and ability. Thus, the lectures, which generally have the character of 'popular science,' should be communicated in a way which is easily understood, and sports activities and excursions must not be too physically challenging.

The whole syllabus may cover two types of activities – academic, and artistic and integrational. Some U3As limit themselves to academic activities, but the vast majority attempts to meet the needs expressed by their students. Therefore, they organize the appropriate events, depending on whether they can find lecturers and instructors within the local community. Thus, in many U3As artistic and intergenerational activities sometimes outnumber academic activities. In an attempt to avoid such a situation, there is a scientific council composed of local education experts.

On the other hand, it is worth to stress a relatively strong need for expression, fulfillment, and integration among seniors, and the role of the U3A, as every educational institution, is to satisfy such need somehow. In U3As where the possibility of meeting such needs is limited, the seniors themselves find their ways, for example, by organizing additional meetings in cafes, clubs, and arts centers, or transferring a part of the activities to their homes or gardens, where the learning environment is less formal.

Some U3As organize special intergenerational activities, some engage undergraduates and Ph.D. students in various subjects, who give lectures as part of their practical work. Joint lessons with school children

also constitute an example of such activities. Namely, lessons on preparation for the old age were conducted in one of the secondary schools in Wrocław.

Apart from activities conducted by selected and reputable specialists or by volunteers, it is worth to mention the short-term activities undertaken within the framework of local, national or (less often) international projects. Such actions sometimes become a part of the syllabus and are valuable experiments which broaden the opportunities of the institute (Jakubowska, 2012).

Government

Generally, Polish U3As are governed by strong, often charismatic leaders, strongly supported by a student council. Here, taking advantage of the opportunities of the university and non-governmental organization is perceived by them as the best chance ever.

Those U3As operating within an educational institution generally have a director appointed by the university, who works in cooperation with the U3A's education council and student council or with the leaders of various sections and groups. Newer U3As, established after 1989, having a non-governmental legal status or created by some other non-governmental organizations are governed by a chairman and council, without any interference from the university. However, in contrast to British U3As, the Polish U3As generally seek the support or patronage of some higher education institutions to have access to the suitable staff.

The remarks above show that there are many types of U3A in Poland, but in fact, they converge, both in form and content. Those connected with an educational institution become open and democratic, whilst those of a non-governmental nature seek the patronage of a university. One way or another, regardless of the organizational form, the U3A assumes dual governance or at least cooperation between various authorities. We can also look at this in another way. The interests of both higher education institutes and senior students are suitably and proportionally represented. In higher education institutes, the rector appoints one of their representatives as a director whereas in the non-governmental model the directors and council are elected. Thus, bottom-up and top-down decision-making comes together in an ideal combination.

The governance system described above is connected with increased opportunities of cooperation with other organizations. In this regard, Polish U3As display a high degree of operational freedom, flexibility and a tendency to move into the space occupied by other organizations. This is the result of the limited local resources which are available to them, as well as constant under-funding. Indeed, since the very beginning, Polish U3As have had to struggle with various shortages, so cooperation with other organizations became essential in order to first survive and then develop.

Currently, the majority of U3As are either non-governmental organizations or governed by non-governmental organizations. The reason for that is twofold: the fall of communism and centralized state control, followed by the democratization of society. Both created the conditions for relatively easy setting up and managing the non-governmental organizations.

During the 1990s a new Higher Education Act in Poland has led to a boom in education and opened up the opportunity of creating private universities and other institutions of higher education. Thanks to that, the number of students quadrupled between 1990 and 2000. However, that increase refers only to young university students and not U3As because the universities were not interested in recruiting elderly students.

Both, already existing and newly created higher education institutions rarely perceived the possibility of fulfilling the so-called 'third mission' through creating U3As, and they were not prepared to discuss the options of widening their activities to include seniors (Kobylarek, 2002).

Finance

Since the very beginning, a lack of stable funding had been one of the most severe problems facing the U3As, and this, in turn, had led to a strong dependency on volunteer work and self-organization. Lack of funds had forced the senior students to conduct lectures themselves or organize meetings, and sometimes also to find material for the lectures.

During the first period of development of U3As as part of the university structure, they could count on practical support in the form of lecture halls and volunteer lecturers. Membership fees had been collected to cover organizational expenses. Practically, that had been the limit of financing opportunities for the U3As. The higher education institutes themselves had not seen the possibility, or even the necessity of allocating their own funds to the needs of seniors. The situation had not changed significantly until after 2000 when special financing programs came into being and U3As could take part in competitions for grants allocated to non-governmental organizations. Of particular importance were such programs as:

- the Polish-American Freedom Foundation grants, since 2005;
- the ASOS government program, since 2012;
- EU projects within the Socrates, Grundtvig and Erasmus+ programs.

At present, there are three independent sources of funding for U3As in Poland. In order of importance, by far the first is membership subscription. The second most important is the subsidy, most often from local government as a means of stimulating the local community. The third source of funding is available through various education programs. Unfortunately, the disadvantage of these programs is that they are transitory – there is no guarantee that one project will lead to another. Thus, money obtained through such

grants cannot be treated as supporting the permanent day-to-day activities of the institution but rather as a one-off contribution, which obviously carries a certain amount of risk.

There are two types of non-financial support for Polish U3As. One of them is voluntary work. This is, of course, not the same as all-important financial support, and its contribution is difficult to evaluate. Nevertheless, there is no doubt that it is a factor which outweighs the acquisition of monetary funding. The strength of Polish U3As lies in the immeasurable input of organizers, lecturers and the seniors themselves, who account for the social capital of the institution. The second type of non-financial support consists of material contributions, such as gifts of books, musical instruments, among the others, donated by institutions, firms and private individuals for the use of the U3A.

Conclusions

The socio-political situation in Poland had a specific influence on the development of U3As, which was closely connected with the opportunities that the state could provide. Under communism, such opportunities were limited, and the U3A could only blossom after the attainment of political independence and improvement in the national economy. Polish U3As developed on many different tracks. One could say, that it is essentially a kind of an on-going experiment, attempting to cope with various challenges, and adapting to the needs of the surrounding environment on both a micro and a macro scale. It seems that this is the best possible approach in testing various education solutions, as shown by the flexibility of the institution and the ingenuity of its understanding.

Currently, it is not possible to fit Polish solutions into the British, French or any other model suggested by the literature. One can only look for similarities and characteristics common with other world-wide solutions. As a specialist institution, adapted to the needs of a precisely defined senior student, several features make the Polish model of the U3A stand out – democracy, holistic education, flexibility, and inter-generational cooperation.

One may also predict that U3A is the type of institution which will sooner or later succumb to converge in various parts of the world, provided people willing to adopt and test different solutions are found. Presented observation confirms that the ability of the U3A to adopt one of these models depends on the organization of education itself.

Thanks to the cooperation with dynamic teams of dedicated people, the U3A at the University of Wrocław successfully transferred in the years 2009 through 2016 the best solutions to organizations in Ukraine and Belarus. The most important of those solutions are – the needs analysis of elderly students, mechanisms for stimulating and maintaining active local leaders, diverse sources of funding, participation in international cooperation, working conferences,

and study trips. The fact that these few dozen U3As, established within the framework of various international projects, chose to develop according to the Polish model rather than the British or French ones, although there was no pressure on them to do so, gives the evidence of the strength of the described model. Thus, it would appear that these solutions are even more worthy of dissemination. Therefore, it is even more painful that U3A at the University of Wrocław which served as the example in these considerations became the victim because of the radical change in its management in 2016. From that time the institution cut off all international contacts and practically ceased to undertake any initiative in the field of international cooperation. It even stopped to have any primacy in the local environment, being reduced to just one of many similar institutions catering only for its own students. Though, it is yet more proof confirming that these are above all charismatic leaders who have shaped the vision and mission of the Polish U3A.

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Abstract

The article describes the history of a specific type of the University of the Third Age which was developed in Poland and spread out to other countries in the region. The author describes the genesis of this type of education as well as the criteria which governed changes in educational institutes for seniors. Above all, the article discusses the innovative solutions, education practices, and trends which initiated the post-2000 boom in adult education in Poland. The author summarizes and structures the experience gained while working as the Director of the University of the Third Age at the University of Wrocław in years 2006–2016, with particular reference to the national and international perspective. Remarks of the reflexive practitioner are compared and contrasted with ultra-local trends and take the form of meta-analysis. The results lead to one fundamental conclusion – in Poland a specific model for the education of seniors was formed. We may describe it as bottom-up, democratic, holistic and flexible.

Keywords: U3A; adult education; holistic education; university mission; lifelong learning

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WE RECOMMEND

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The following sub-themes have been established to explore the general theme of the conference:

Theme 1. Exploring international and European perspectives on quality in education as well as teacher education and their policy impact

Theme 2. Reforming teaching and teacher education: towards high quality education for all

Theme 3. Raising teacher quality: attracting, supporting and preparing a diverse student- teacher population

Theme 4. Strengthening teacher education and teaching profession: conditions for quality teaching and learning

Theme 5. Developing cultures of sharing and collaboration as a means of supporting teachers' professional learning and development

More information: <http://tepe2019.pl>

The screenshot shows the website for the TEPE 2019 conference. At the top, there is a navigation menu with links for HOME, CONFERENCE, CALL FOR PAPERS, PROGRAMME, KEYNOTE SPEAKERS, and PRACTICAL INFORMATION. Below the menu, the main title of the conference is displayed in large, bold letters: "Quality Teachers and Quality Teacher Education: Research, Policy and Practice". Underneath the title, the dates and location are given: "16-18 May 2019, Cracow, Poland". There is also a "REGISTRATION" button in the top right corner.