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Education as a factor in changing the life situation of older people

Edukacja jako czynnik zmiany sytuacji życiowej ludzi starszych

Abstract

The context of the research was the educational dimension of the life situation of older people. The life situation of seniors may depend on various factors. One of them is the activity they undertake. Educational activity, broadly understood, plays a special role in this area.

The aim of the research was to show the role of education (educational activity) as a factor in changing the life situation of older people, as well as to indicate the need and opportunities for educational activation of seniors and supporting their comprehensive development.

The applied research method was the analysis of existing data, taking into account, in particular, publications in the field of social and educational gerontology and social pedagogy.

The results of the research indicated the important role of education (educational activity) as a factor in changing the life situation of older people, as well as the need to undertake various activities in the field of educational activation of seniors, and to support their comprehensive development. A special role in this area should be played by educational, cultural and aid institutions and organizations, the mass media, as well as the elderly communities themselves.

The conclusions from the research were that undertaking various educational and supportive activities contributes to increasing the possibilities of older people to influence their own life situation and to improve the quality of their lives.

Keywords: activation, activity, education, elderly man, life situation, development support.

Abstrakt

Kontekstem badań był edukacyjny wymiar sytuacji życiowej ludzi starszych. Sytuacja życiowa seniorów może zależeć od rozmaitych czynników. Jednym z nich jest podejmowana przez nich aktywność. Szczególną rolę w tym obszarze odgrywa szeroko rozumiana aktywność edukacyjna.

Celem badań było ukazanie roli edukacji (aktywności edukacyjnej) jako czynnika zmiany sytuacji życiowej ludzi starszych, a także wskazanie na potrzebę i możliwości w zakresie aktywizacji edukacyjnej seniorów oraz wspomagania ich wszechstronnego rozwoju.

Zastosowaną metodą badawczą była analiza danych zastanych, uwzględniającą w szczególności publikacje z zakresu gerontologii społecznej i oświatowej oraz pedagogiki społecznej.

Wyniki badań wskazały na istotną rolę edukacji (aktywności edukacyjnej) jako czynnika zmiany sytuacji życiowej ludzi starszych, a także potrzebę podejmowania różnorodnych działań w zakresie aktywizacji edukacyjnej seniorów i wspomagania ich wszechstronnego rozwoju. Szczególną rolę w tej sferze powinny odgrywać instytucje oraz organizacje edukacyjne, kulturalne i pomocowe, środki masowego przekazu, a także same środowiska senioralne.

Wnioski z badań były takie, że podejmowanie zróżnicowanych działań edukacyjnych i pomocowych (wspierających) przyczynia się do zwiększenia możliwości osób starszych w zakresie wpływania na własną sytuację życiową oraz podnoszenia jakości swojego życia.

Słowa kluczowe: aktywizacja, aktywność, człowiek starszy, edukacja, sytuacja życiowa, wspomaganie rozwoju.

1. Introduction

Many researches and scientific analyses have been devoted to the life situation of older people in Poland (or its selected dimensions) in the last several decades (Zych and Bartel, 1990; Slany, 1996; Trafiałek, 1998; Synak ed., 2002; Tokaj, 2005; Róg, 2012; Rudnik and Czykier, 2013; Jopkiewicz and Adamiak, 2014; Kubiak, 2014; Krzysztofiak, 2016). The life situation may depend on various factors, for example: gender, age, marital status, education, financial situation, and housing conditions. A permanent place of residence is of great importance in this area. It is an environment that determines all material and non-material conditions that, to a greater or a lesser extent, are available to people living in it. As a result, it exerts a direct or indirect impact on, among others, the use of various types of devices and institutions, the quality of interpersonal relationships or the way of spending free time (Rudnik and Czykier, 2013,

pp. 203–204). For people in old age, this environment is usually the basic plane of life (Trafiałek, 2006, p. 218). Therefore, it significantly influences their life situation, on which the decisions and choices made by seniors often depend. Older people can, at least to some extent, influence their life situation. They can try to shape it, change it, especially when they are properly supported in this regard by others (e.g. through specific educational or activating activities). They themselves, by undertaking various forms of activity, increase their possibilities in this area. A special role should be assigned to the educational activity of seniors.

The aim of this study is to show the role of education (educational activity) as a factor in changing the life situation of elderly people, as well as to indicate the need and opportunities for educational activation of people at senior age and supporting their comprehensive development. The existing data analysis was used as research method. It took into account mainly current publications in the field of social and educational gerontology and social pedagogy, both reviews and empirical works.

2. Life situation – definition of the concept

The life situation is not an easy concept to define, due to its multidimensionality. Its definition requires clarification of the term *situation* itself. In general, a situation is “a set of circumstances, the position in which someone finds himself, all conditions in which something happens, something develops” (*Słownik języka polskiego*, 1983, p. 387). According to Tadeusz Tomaszewski, the human situation is “a system of his mutual relations with other elements of his environment at a specific point in time” (Tomaszewski, 1982, p. 17). Each situation is defined by its components and their properties, by the state of individual components at a given moment in time, as well as by the mutual relations between the components at that time (Tomaszewski, 1982, p. 18). Characterizing of someone’s situation requires taking into account both the objective state of the environment and the way it is perceived by the subject of the situation (Bilewicz, 2016, pp. 37–38). Taking into account the basic categories of human activity, Tomaszewski distinguishes two main types of situations: behavioral (functional), for example, educational, therapeutic, examination, and existential (life) situations, such as material, housing, and family situations (Tomaszewski, 1982, pp. 18–19).

Mikołaj Winiarski gives a broad understanding of the life situation of a person (Winiarski, 2007). He describes it as “distinguishing fragments

of life, constituting specific wholes, structural and functional systems that are co-created by: the own activity of the subject of the situation, recognized and realized human values, external conditions (social, cultural, natural), and duration” (Winiarski, 2007, p. 132). These elements form a kind of system, i.e. a set of components related to each other into one whole having a specific structure. Two components of life situations are particularly important: human activity (it determines the nature of the situation) and values (they determine the direction of this activity). Life situations are characterized by a specific spatio-temporal framework, which means that they are actualized in a given place (environmental context, e.g. place of residence, family, work environment) and time (they may occur for a longer or a shorter period of time) (Winiarski, 2007, pp. 132–133). Understood this way, the life situation is always:

- subjective (it is always somebody’s, it concerns a specific person or a social group);
- social (apart from the subject of the situation, other people take part in it);
- relational (there are specific interactions between the subject of the life situation and other people involved in it);
- dynamic (life situations are transformed) (Danilewicz, 2006, p. 70).
- Various categories of life situations can be indicated, based on, for example:
 - the number of people participating in them (individual, collective);
 - duration (short-term, long-term);
 - location (for example, family, workplace, local environment);
 - degree of normality (normal – they are characterized by a high degree of human independence and a small scope of caring, helping or supporting activities; abnormal – they occur when the individual cannot function independently, meet his own needs, achieve his goals) (Winiarski, 1999, p. 294).

Life situations vary greatly according to the phase of human life. All kinds of them can occur both in childhood and adolescence, in the period of life and professional stabilization, as well as in late adulthood (Winiarski, 2007, p. 134).

3. Dimensions and components of the life situation of the elderly

The functioning of man in late adulthood may depend on various factors which include, among others, living conditions, medical care, lifestyle, undertaken activity, social roles, personality traits (Worach-Kardas, 2015, p. 12). Therefore, when analyzing the life situation of people at senior age, various dimensions should be taken into account, including: biological, material, social, cultural and psychological (Krzysztofiak, 2016, pp. 127–129).

In the biological sphere, the life situation is determined, in particular, by the health condition of the senior, his efficiency in the implementation of daily activities, the ability to independently meet his needs and maintain independence in life. In the material dimension, the life situation is shaped by the social, living and financial conditions. The social dimension relates to relationships with other people and participation in society, it also applies to the positions held in various groups (collectives) and the roles played in them (e.g. in the family, neighborhood group, local community). The cultural dimension is determined, among others, by education, cultural needs and interests, patterns and types of undertaken activity, rules defining the organization of everyday life, as well as recognized and realized values. In the psychological dimension, the life situation is determined, among others, by the attitude towards one's own old age, by mental well-being, type and intensity of manifested emotional needs.

This division certainly does not exhaust all possibilities. The diagnose of the life situation would require taking into account all possible aspects or areas of seniors' lives, which, for various reasons (including the limitations of research), is often impossible. Researchers dealing with this issue usually select the components of the life situation that are important from the point of view of the research objectives.

For example, Brunon Synak (and coworkers), when exploring the life situation of older people in Poland, took into account the following elements:

- health and fitness;
- health care and disease assistance;
- material situation and social assistance;
- housing conditions and household;
- family situation;
- professional work;
- social and religious activity;
- the issue of life satisfaction;
- the issue of social policy towards elderly people (Synak, 2002, pp. 23–24).

Krystyna Slany, on the other hand, when analyzing the life situation of Polish seniors, took into account two types of factors: objective (income, professional activity, education, housing conditions) and subjective (assessment of one's place in society and attitude towards it, assessment of one's own health, sense of happiness and will to live) (Slany, 1996, p. 38).

As a consequence, we can distinguish several basic elements that define the life situation of older people. These include:

- the level of life independence of seniors (determined, inter alia, by their health condition, functional efficiency, adaptation abilities);
- the scope of activities undertaken by elderly people and people acting on their behalf (e.g. family members, neighbours, employees of aid institutions);
- environmental conditions (natural, social, cultural) – the closest living environment (family, local environment) and wider circles and structures (regional, state);
- values recognized and realized by seniors;
- historical context in which the life of an elderly person was and continues (Krzysztofiak, 2016, pp. 49–50).

4. The role of education in shaping the life situation of seniors

As already noted, life situations are dynamic – they are subject to change (Danilewicz, 2006). The possibility of influencing one's own situation and shaping it is related to, among other things, the skills or competences of the subject (Krzysztofiak, 2016, p. 49). Therefore, an important role should be assigned to broadly understood education – as a factor of “changing personal life situation” (Dubas, 2016, p. 241). This is especially true for the elderly people.

As Magdalena Pakuła notes: “In contemporary reality, independent shaping of one's life, autonomy and independence are not possible without constantly updating one's knowledge” (Pakuła, 2010, p. 61). Man can learn almost anywhere, for example at school, in various organizations, in the local environment, while travelling; he can gain knowledge by maintaining contacts with other people or by using the mass media. This process can continue throughout life in different dimensions – formal, non-formal and informal (Tomczyk, 2015, pp. 53–54). According to the lifelong learning concept, each person is capable of learning and should be supported in this area (Worek, 2019, p. 31).

Education plays an important role in preventing aging (Pakuła, 2010, pp. 63–64), but it also enables older people to develop in a variety of areas. Taking into

account the social development of an individual, learning in late adulthood equips a person with important competences necessary for full participation in social, cultural, political life, etc. (Fabiś, 2017, p. 172). Education of seniors should be treated not only as a way of self-realization, but also as a manifestation of their striving for independence and improvement of the quality of their own life (Brzezińska, 2011, p. 68). In modern gerontology, education is seen primarily as an emancipatory process (Kanios, 2018, p. 55). According to the assumptions of the competence theory, taking responsibility for one's own life and striving for independence are among the basic goals of education of older people (Skibińska, 2008, p. 99). The level of life independence is an important element determining the life situation of seniors¹ (Krzysztofiak, 2016).

Sandra Timmermann indicates four types of education that are used to achieve human independence. She lists among them:

- acquiring knowledge and skills that help to maintain economic fundamentals (for example skills enabling employment);
- the acquisition of practical skills necessary for further life (for example, the skills to overcome everyday difficulties);
- acquiring skills that enable action for other people (for example, helping other people to solve problems);
- acquiring knowledge and skills allowing for comprehensive development and achievement of full humanity (Ziomek-Michalak, 2018, pp. 163–164).

The educational activity of seniors is closely related to the problems of adaptation to late adulthood (Mandrzejewska-Smól, 2012, p. 160), with the need to adapt to many changes, losses or deficits (Steuden, 2011, p. 71). In this process, a special place is occupied by self-education of older people, understood as independent and voluntary learning in various fields (Pięta, 2004, p. 113). Self-education allows not only to acquire or expand knowledge, but also to shape many important skills, for example, making decisions or making choices (Fabiś, 2017, p. 196).

The above considerations indicate that educational activity fulfills many important functions in the life of seniors, including, inter alia, the adaptive, integrating, compensating and preventive functions (Pakuła, 2010, pp. 63–64). Thanks to educational activity, an older person can function more efficiently in his daily life, he can satisfy his own needs, act with better efficiency, and better cope with encountered difficulties. Thanks to the acquired knowledge

¹ Man's independence, which manifests itself in various areas of his life and activity, determines that his life situation is normal (there is harmony between the external conditions, set goals and tasks and the capabilities of a person) (Winiarski, 2007, p. 135).

and skills, he can significantly improve, for example, his own economic or health situation. Education in old age can prevent apathy, feelings of helplessness and boredom, which often arise as a result of professional inactivity after retirement. Moreover, educational activity enables taking up new roles and activities, it facilitates social integration as well as participation in social and cultural life. Also, it raises the prestige of older people in their family environments and society (Wawrzyniak, 2008, pp. 278–279; Pakuła, 2010, pp. 62–63). As Pakuła says: “Education understood broadly – as the learning of all forms of knowledge, skills and attitudes that can contribute to the improvement of the quality of life – causes greater involvement of seniors in caring for their own fate” (Pakuła, 2010, p. 63).

Despite the benefits associated with undertaking educational activity in old age, seniors in Poland are still characterized by relatively low activity in this area. This applies to their participation in both formal and non-formal and informal education (less than 20% of the surveyed seniors aged 60–69 confirm their participation in any form of learning) (Małycka, 2019, p. 96). The older the seniors are, the less often they undertake educational activity (Kawińska, 2018, p. 54). Older women are more willing to engage in it than men. The main barriers to educational activity of old people in Poland include health problems, impaired auditory and visual perception, and difficulties with moving around (Adamczyk, 2015, pp. 29, 34). An important factor limiting the participation of seniors in education are the negative stereotypes about old age and old man that still function in Polish society, and the belief of many people (including seniors) that learning is reserved primarily for young people.

The activity of seniors, including educational activity, should therefore be properly stimulated (Róžański, 2017). In the face of various barriers to the activity of older people, the issue of activating² seniors becomes of great importance. Therefore, appropriate measures should be taken to encourage old people to be active and to facilitate their active life (Róžański, 2020, p. 141). According to the assumptions of the theory of activity, seniors who are active show a higher level of satisfaction with their lives (Halicki, 2006, pp. 261–262). Gerontological research shows that active people in old age live longer and are characterized by a better mental condition (Steuden, 2011, p. 90). According to the *Active Aging* concept, the potential of older people can be realized in four main areas, includ-

² Activation means “initiating, motivating, encouraging, stimulating, inspiring, showing opportunities to act and change” (Gościńiewicz and Szkuřlat, 2015, p. 474). It can be implemented in various forms. Their selection depends primarily on the individual characteristics of a person (for example, age, place of residence, health, interests), the activation program, as well as the material and organizational capabilities of people, environments and institutions that undertake such activities (Chabior, 2017, p. 69).

ing professional activity, social and family activity, activity for an independent and healthy life, building an environment that is friendly to undertaking activity and maintaining intergenerational contacts (Worach-Kardas, 2015, pp. 17–18). The scope of activities undertaken by seniors is one of the basic elements determining their life situation (Krzysztofciak, 2016).

Learning is the essential component of active aging (Adamczyk, 2015, p. 29). In the sphere of intellectual functioning, older people can participate in various activities organized by the Universities of the Third Age, such as lectures, seminars or language courses (Leszczyńska-Rejchert, 2010, p. 171; Ziomek-Michalak, 2014, p. 74; Struck-Peregończyk, 2016, pp. 74–75). These types of activities enable seniors to exchange experiences and take on different roles (Pikuła, 2014, p. 134). In their place of residence, older people often have the opportunity to take advantage of the educational offer of other institutions or organizations, including senior clubs, seniors activity centers, libraries or community centers (Fabiś, 2014, pp. 59–60, 71). The mass media, especially the Internet (Wawrzyniak, 2017), and strongly developing free-time offer are starting to play an increasingly important role in this area (Szarota, 2014, p. 32). There are also many publications, including guides, aimed both at the elderly and various specialists dealing with the activation of seniors (Strugarek and Wieczorek, 2010; Kowalczyk, 2011; Schimanek and Wejcman, 2013; Piekarska and Piekarski, 2017). Some of them are the result of cooperation between academic centers and institutions educating elderly people (Pikuła ed., 2014). These publications include knowledge (many practical tips) on issues such as health, nutrition, leisure and learning.

Activating old people in the field of education requires a properly functioning, dynamic educational environment of adults. This environment should be created not only by institutions, but also by family, informal groups, associations and the mass media (Jankowski, 2008, p. 65). In the process of activating seniors, it is important to take into account their various competences, life experiences, as well as passions and interests (Chabior, 2017, p. 70). It is also important to properly recognize the needs of older people, their aspirations, as well as the problems they experience (Różański, 2020, p. 142).

The elongation of human life should be seen as a positive phenomenon, a testimony to social development and improvement of living conditions. The increase of the population of old people, however, entails the need to organize and develop specialist help (Błądowski and Dziegielewska, 2006, p. 189). At this point, it is worth paying attention to the role of social work in supporting the development and activation of the elderly (Leszczyńska-Rejchert, 2016, pp. 79–98), as the quality of life of elderly people often depends on the environmental

and institutional possibilities of supporting them (Struck-Peregończyk, 2016, p. 68). Social work with seniors cannot be limited to providing material assistance. It should also consist in supporting the development and motivating older people to act, especially those who are in a difficult life situation. In this case, it is primarily about the activities aimed at maintaining independence in life or helping the elderly to become independent, keeping seniors active, preventing the feeling of loneliness and social isolation of older people, social integration of people of senior age, providing the elderly with favorable conditions in their living environment – adapted to their needs (Kanios, 2018, pp. 72, 73).

In the process of supporting the development of seniors, the following should be considered in particular: educational measures (for example persuading, encouraging activity, organizing educational situations); activities encouraging older people to self-educate; activities aimed at transforming of the living environment of seniors in a way it favours their comprehensive development (Leszczyńska-Rejchert, 2016, p. 81). It requires the knowledge of social workers, not only in the field of pedagogy and psychology, but also in gerontology (Trafiałek, 2001, p. 83; Leszczyńska-Rejchert, 2016, p. 173). Moreover, in recent years, the need for highly specialized gerontological education of social workers and the introduction of the gerontological profession of a social worker has been emphasized (Pikuła and Jagielska, 2017, pp. 179, 181).

Summing up, it needs to be stated that the educational activity of elderly people, one of the main goals of which is to maintain their independence in life, often requires appropriate stimulation. An important role in this area should be played not only by educational, cultural and aid institutions (or organizations), local and supra-local mass media, but also by the seniors themselves, thanks to various forms of self-organization of older people.

5. Conclusion

This article is only an attempt to signal the issue of the educational context of the life situation of seniors. It follows from the above considerations that the life situation of older people includes many elements that can be put into some ordering groups (categories, dimensions). These elements form a specific system, a set of interrelated components with a specific structure. They should be considered taking into account the dependencies between them. The possibility of shaping one's own life situation is, to a large extent, related to the types of resources possessed or available to seniors (e.g. economic, social), as well as

their skills and competences in various fields (including the ability to use various resources). Hence, an important role is assigned to the educational activity of elderly people. Along with the extension of human life and the aging of societies, as well as dynamic technological development, the education of the elderly is gaining in importance. It can and should be perceived as an important factor in changing (improving) the life situation of seniors, preventing their marginalization and social exclusion.

From the perspective of contemporary pedagogy, especially social pedagogy and geragogy (Kawula, 2005; Tokaj, 2008, 2014; Leszczyńska-Rejchert, 2010, 2016; Halicka and Halicki, 2017), the following should be considered important:

- on the one hand – conducting systematic researches (diagnoses) of the life situation of older people, enabling them to learn about their real needs, aspirations, expectations and difficulties and limitations they experience, but also to learn about their capabilities (potential, resources);
- on the other hand – undertaking various educational and aid (supportive) activities, increasing the possibilities of seniors to influence their own life situation, and thus to improve the quality of their lives.

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