

SOC203 SOCIAL GERONTOLOGY (Jan. 2009)

Professor David R Phillips

OUTLINE

This course introduces you to social gerontology as a subject area and its concerns with the impact of human ageing on all aspects of society. Gerontology is a multi-disciplinary field which studies the interrelated biological, psychological and social aspects of human ageing. It examines contemporary social issues and policy aspects of ageing and to encourage students to think about, analyse and project the effects of population ageing on political, economic, social welfare, cultural and recreational policies. The course examines individual, family and societal issues, measures of ageing and health (physical and mental), the environment and older persons' quality of life.

COURSE AIMS

SOC203 aims to demonstrate how and why many societies in East and West are growing older (sometimes called “demographic ageing”) and what tends to happen when this occurs. The course explores how older persons and their families are viewed in society and emphasises a positive approach to ageing, that older people can be regarded as a resource. Major social theories of ageing and concepts such as *Productive ageing*, *Successful ageing* and the current WHO policy framework *Active Ageing* are studied. When individuals age, biological changes may be accompanied by changes in behaviour, social and economic social status, which can lead to changes in social relations and attitudes towards life in general, with which some people cope better than others (“successful ageing”). Sometimes older people experience stereotyping and may be presented in a negative light and occasionally “scapegoating” (blame) or a moral panic approach is to be seen. The course also examines economic, social, health and accommodation issues. Examples are drawn from Hong Kong, China, the Asia-Pacific and also worldwide.

WHAT YOU WILL LEARN FROM THIS COURSE

Upon completion of the course Social Gerontology, you

1. will be able to identify what is happening to populations in terms of ageing in many countries worldwide and especially in Asia-Pacific region, and be able to explain the main reasons for population ageing.
2. will be able to identify the major implications of population ageing, and explain the extent to which it can necessitate re-examination of current and future political, social, welfare, health and economic policies and you will be aware of the risks of a ‘moral panic’ approach.
3. will be able to discuss the impacts of population ageing on many sectors: accommodation,

employment, transport, environmental design, education, health care, social welfare, leisure and tourism and on the future of families and family relations.

4. will be able to explain and apply the main social theories of ageing.
5. will be able to explain the main physical and psychological changes associated with ageing and realise which are abnormal changes and the consequences of health related changes (such as in ADLs) for people's ability to live independently if they choose.
6. will be able to explain concepts such as *Successful ageing*, *Productive ageing* and *Active ageing*, and a *Life-course perspective* and assess if they help understand the situation of older persons in Hong Kong and other countries you may have selected.
7. will be able to summarise and evaluate the major debates on older persons in society and how ageing should be regarded as part of the normal lifecourse.

Teaching and learning effectiveness will be monitored by means such as:

- Use of formal and informal channels (formal CTE, informal communication and interaction with students)
- Continuous assessment (outlines, presentations) and feedback to students for preparation of presentation outlines and after presentations
- Co-ordination and communication between instructor and tutors
- Tutorials provide opportunities for informal discussion with tutors
- Revision tutorials and review sessions held in lectures when appropriate

PLEASE BE SURE TO READ PAGES 1-4 at a minimum, as these contain essential information for the course and assessment. Pages 5-10 contain course reading suggestions, websites and valuable resources to which you can refer for the course and your essays.

SOC203 SOCIAL GERONTOLOGY: COURSE OUTLINE

I Introduction to social gerontology; ageing in the Asia-Pacific region

- a) Gerontology and social gerontology: definitions, multidisciplinary perspectives
- b) What is human ageing? Chronological, biological, psychological and social ageing. Key concepts to be followed in later sections: *Successful/resilient ageing*; *Active Ageing*; *Productive Ageing*; *Healthy Ageing*
- c) The demography of ageing: key population and health measures (ELB, TFR, etc); demographic transition; global ageing
- d) Ageing trends in the world, Asia-Pacific region, Hong Kong and China
- e) Demographic ageing in the Asia-Pacific region – the challenges of success (WebCT powerpoint)
- f) Factors ('determinants' of) affecting population ageing – decline in fertility and mortality - increasing life expectancy; reducing family sizes; epidemiological (health-related) change (examples from HK and the Asia-Pacific)

II Social perspectives and social policy issues in ageing

- a) Social theories of ageing
- b) Ageing, individuals, families and society: social support, changing (reducing) family size and structures, employment patterns, migration
- c) The concept of dependency: physical, economic, active life expectancy.
- d) Respect for old age in the East and West; *filial piety*
- e) Is old age as a social problem? ageism and the ‘moral panic’
- f) What is social policy? Aspects of social policy of special relevance to ageing:
- g) *Active Ageing* – a WHO Policy Framework (see also IVd below)

III Biological and psychological contexts of ageing

- a) Biological theories of ageing and physiological (physical bodily) changes with age
- b) Introduction to psychological ageing (mind and behaviour) and cognitive changes with ageing: intelligence, learning and memory; life-span development
- c) Ageing and some disorders; depression, dementias/Alzheimer’s disease
- d) *Successful ageing, Resilient ageing*; Adjustment in later life; attitudes to past, present; death, dying and bereavement; stress, coping and adaptation

IV Economic perspectives; Productive Ageing and Active Ageing

- a) Economic implications of population ageing and demographic patterns - moral panic (see also IIe); macro-economic features
- b) Work and retirement; paid and non-paid roles and activities; economic status of older persons and the risk of elderly poverty
- c) *Productive ageing*; continued work and employment; older volunteers; older persons - a new ‘market segment’ – *the silver market?*
Active Ageing: WHO Policy Framework (see II f above)
- d) Ageing in the People’s Republic of China case study – population policy, population ageing and national policy

V Ageing and health

- a) Ageing and health changes: Epidemiological concepts: morbidity, mortality; infectious and chronic diseases; biological ageing; health status, disability
- b) Brief introduction to Epidemiological (health) transition; general concept, uses of ET
- c) Healthy life expectancy; Activities of Daily Living (ADLs) and Instrumental ADLs (IADLs)
- d) Implications of ageing trends for health and health care policy and practices

VI Living arrangements of older persons: housing and accommodation

- a) Housing and living arrangements of elderly people, what factors need to be taken into account; choices in accommodation and the housing continuum
- b) Long-term care (LTC); Care in the community and institutional care; home care; deinstitutionalization; *Ageing in place*

- c) Sources of care and support: family, friends, social supports: social care; formal and informal sources of care
 - d) Environment and ageing: what makes a good environment for older persons? *Ageing in place* or '*in situ*'; Quality of life issues; environmental issues. *Global Age-Friendly Cities: a Guide* – WHO 2007
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ASSESSMENT

Learning outcomes will be assessed by

(i) *Continuous assessment* (coursework) comprising:

Tutorial presentation and participation plus term paper/essay (tutorial mode only)

(ii) *a final examination* (for all students)

With regard to your coursework in particular, you are reminded: You must note the sources of quotations, data and general information in the essay (see Guidelines for Presentations/Essays). These sources/references should appear in alphabetical order in your list of references/bibliography. Essays without a proper reference list will lose one grade.

According to Lincan University and Social Sciences Programme policy, plagiarism is "**presentation of another person's work without proper acknowledgment of the source**". Plagiarism (unattributed copying) will be heavily penalised and may attract a zero mark and disciplinary action.

(i) *Continuous assessment* (50%):

TUTORIAL MODE STUDENTS

The continuous assessment involves tutorial participation, a group presentation and an individual essay (term paper), assessed:

- a. Group presentation in the tutorial class; your participation in tutorials (25%)
- b. **INDIVIDUAL TERM PAPER** (essay) (25%)

Essays must be written by **each** student and should make reference to appropriate concepts/theories in social gerontology and contain a proper reference list. Maximum word length of text **2,000 words**.

FINAL DATE FOR SUBMISSION OF TERM PAPER/ESSAY:

Monday 4 May 2009 12 noon (earlier submission is welcome)

(ii) *Final Examination Paper* (50%)

Wednesday 29 April 2009 10.00am-12.00pm (Room TBA)

COURSE READINGS:

a. ESSENTIAL READINGS

1. Phillips, D.R. (ed.) (2000) *Ageing in the Asia-Pacific Region*. London: Routledge (Chapter 1 and selected countries only as required)

2. Kinsella, Kevin and Phillips, David R. (2005) Global aging: the challenge of success. *Population Bulletin*, Vol. 60, no.1, March, pp. 1-40 (Whole issue). This is available on WebCT and can also be downloaded free from www.prb.org (Population Bulletin)

3. **Either:** Hooyman, Nancy R and Kiyak, H Asuman, *Social gerontology: a multidisciplinary perspective*. Boston: Allyn and Bacon. (Several editions: 1988, 1991, 1993, 1996, 1999, 2002, 2005, 2008)

Or: Novak, Mark *Issues in aging*. Boston: Allyn and Bacon, 2006, 2nd ed (1st. edition 1997)

b. SUPPLEMENTARY READINGS

These are alternatives, you should select only a few (suggestions will be made in lectures):

Andrews, G J and Phillips, D R (eds.) (2005) *Ageing and place*. London: Routledge. Various chapters depending on topic. Also in Paperback (2008)

Bond, J, Peace, S., Dittmann-Kohli, F., and Westerhof, G. (2007) *Ageing in society*. 3rd Ed. London: Sage.

Chi, I, Chappell, N L and Lubben, J. (2001) (eds.) *Elderly Chinese in Pacific Rim countries: social support and integration*. Hong Kong: Hong Kong University Press.

Cockerham, W C (1997) *This ageing society*. 2nd Ed. Prentice-Hall, Upper Saddle River.

Foos, P.W. and Clark, M.C. (2003) *Human aging*. Boston: Allyn and Bacon.

Harper, Sarah (2006) *Ageing societies: myths, challenges and opportunities*. London: Hodder Arnold. (on Short Loan, Library)

Johnson, Malcolm M. (ed) (2005) *The Cambridge handbook of age and ageing*. Cambridge: Cambridge University Press. *You can view the contents on:*
<http://www.cambridge.org/catalogue/catalogue.asp?isbn=0521533708&ss=cop>

Kart, C S and Kinney, J M (2001) *The realities of aging: an introduction to gerontology*. 6th Ed. Boston: Allyn and Bacon.

Phillips, D R (ed) (1992) *Ageing in East and South-east Asia*. London: Edward Arnold.

Phillips, D R (ed) (2000) *Ageing in the Asia-Pacific region*. London: Routledge.

Phillips, D R and Chan, A C M (eds) (2002) *Ageing and long-term care: national policies in the Asia-Pacific*. Singapore: Institute of Southeast Asian Studies.

Sanderson, W and Scherbov, S (2008) Rethinking age and aging, *Population Bulletin* 63, 4, Dec., 1-16 (whole issue) www.prb.org

United Nations (2007) *World Economic and Social Survey 2007: Development in an Ageing World*. New York: UN.

<http://www.un.org/esa/policy/wess/wess2007files/wess2007.pdf>

Yoon, Hyunsook and Hendricks, Jon (2006) *Handbook of Asian Aging*, Baywood Publishing Company, Amityville, New York.

關銳煊、陳章明、梁萬福合編。(2004).*護老者綜合服務論叢*，天地圖書出版

JOURNALS in which you can find useful papers (there are also others):

Ageing and Society; Hong Kong Journal of Gerontology (now called *Asian Journal of Gerontology and Geriatrics*); *International Journal of Aging and Human Development*; *Journal of Aging Studies*; *Journal of Aging and Health*; *Journal of Cross-Cultural Gerontology*; *Journal of Gerontology*; *The Gerontologist*; *Psychology and Ageing*; *Social Science and Medicine*; *Ageing International*; *Asia-Pacific Population Journal (UNESCAP)*

International Organization Websites on ageing:

WHO (World Health Organization) (2002) *Active ageing: a policy framework*. Geneva: WHO. This framework is available on:

<http://www.who.int/hpr/ageing/index.htm>

United Nations (2002) (UN) Madrid International Plan of Action on Ageing, 2002

<http://www.un.org/esa/socdev/ageing/waa/a-conf-197-9b.htm>

UN ESCAP (1998) The Macao Plan of Action on Ageing for Asia and the Pacific

<http://www.unescap.org/ageing/macau.htm>

UNESCAP (2002) Shanghai Implementation Strategy: regional implementation strategy for the Madrid International Plan of Action on Ageing 2002 and the Macao Plan of Action on Ageing for Asia and the Pacific 1999

<http://www.unescap.org/esid/psis/ageing/strategy/index.asp>

Mujahid, G. (2006) *Population Ageing in East and South-east Asia*. Papers in Population Ageing, 1. Bangkok: UNFPA. Available online at:

http://cst.bangkok.unfpa.org/docs/bkageing_asia.pdf

Population Reference Bureau, USA: <http://www.prb.org>

World Population Data Sheet 2008:

<http://www.prb.org/Publications/Datasheets/2008/2008wpds.aspx>

United Nations Resources on Ageing: <http://www.un.org/issues/m-age.html>

Global Action on Aging Newsletter (United Nations, New York) <http://www.globalaging.org/>

United Nations (2008) *Regional Dimensions of the Ageing Situation*. New York: UN. <http://www.un.org/esa/socdev/ageing/documents/publications/cp-regional-dimension.pdf>

READINGS FOR SPECIFIC PARTS OF THE COURSE

Reading suggestions will be given during the lectures. Some items are on WebCT or Library short loan. Note: these are *alternatives* - you are **NOT expected to read them all**

I SOCIAL GERONTOLOGY AND AGEING IN THE ASIA-PACIFIC REGION

The above introductory texts will be used for this section, especially:

*Hooyman, N R and Kiyak, H A (2005) Ch. 1 and 2

*Novak (2006) (Chapters 1,4) and/or:

*Kinsella and Phillips (2005) pp. 1-16

Also: general background and examples on “Demographic ageing”:

Kinsella, K and Velkoff, V.A. (2001) *An Aging World: 2001*. US Census Bureau, Series P95/01-1. Washington DC: US Government Printing Office.

HelpAge International (2002) *State of the world's older people 2002*. London: HelpAge International.

Martin, L G and Preston, S H (1994) *Demography of Aging*. Washington DC: National Academy Press.

Perspectives on ageing in the Asia-Pacific region (esp. HK and China)

*Phillips, D.R. (ed.) (2000) *Ageing in the Asia-Pacific Region*. London: Routledge.

*ESCAP (2002) *National policies and programmes on ageing in Asia and the Pacific: an overview and lessons learned*. New York: United Nations (mainly drafted by D R Phillips and A C M Chan)

Mujahaid, G. (2006) *Population Ageing in East and South-east Asia*. Papers in Population Ageing, 1. Bangkok: UNFPA. Available online at:

http://cst.bangkok.unfpa.org/docs/bkageing_asia.pdf

United Nations (2008) *Regional Dimensions of the Ageing Situation*. New York: UN. See chapter III Ageing trends in Asia and the Pacific, S T Cheng, A C M Chan and D R Phillips (pp. 53-69). Available online at:

<http://www.un.org/esa/socdev/ageing/documents/publications/cp-regional-dimension.pdf>

Bengtson, V L et al (2000) *Aging in East and West*, New York: Springer. Various chapters.

Bartlett, H and Phillips, D R (1997) Ageing and aged care in the People's Republic of China: national and local issues and perspectives. *Health and Place*, 3,3, pp. 149-159.

Bartlett, H and Phillips, D R (1995) Ageing trends - Hong Kong. *Journal of Cross-Cultural Gerontology*, 10, 257-265.

ESCAP (1996) *Added years of life in Asia: current situation and future challenges*. Asian Population Studies Series no 141. New York: UN. (some chapters on short loan)

ESCAP (1996) *Population ageing in Asia and the Pacific*. Bangkok, UN ESCAP.

Joseph A E and Phillips, D R (1999) Ageing in rural China. *Journal of Cross-Cultural Gerontology* (see Short Loan)

Phillips, D R and Bartlett, H (1995) Ageing trends - Singapore. *Journal of Cross-Cultural Gerontology*, 10, 349-356.

Teo, Peggy, Mehta, Kalyani, Thang, Leng Leng and Chan, Angelique (2006) *Ageing in Singapore: service needs and the state*. London: Routledge.

Special issues of some Journals:

Southeast Asia Journal of Social Science, 1999, Volume 27, Part 2.

Asia-Pacific Population Journal, 1997, Vol. 12, Part 4; 1999, Vol. 14, Part 4.

Asia-Pacific Population Journal, 2006, Vol. 21, Part 3 (several papers on demographic ageing, workforce and living arrangements in Asia.

Asia-Pacific Population Journal, 2007, Vol. 22, Part 2 on low fertility in Asia.

II SOCIAL PERSPECTIVES AND SOCIAL POLICY ISSUES

***Hooyman, N. and Kiyak, H.A. (2005) Chapter 3 and 8 (social theories of ageing), Ch. 16 (USA-oriented)**

*Novak M. (2006) Chapters 2,13

*Kinsella and Phillips (2005) pp. 21-26

Baltes, M.M. (1996) The concept of dependency. Chs. 1,2,9, 10.

Bernard, M. and Phillips, J. (eds) (1998) *The social policy of old age*. Centre for Policy on Ageing, London. Various chapters on aspects of social policy and old age.

Kart and Kinney (2001) Ch. 9 (Social theories of ageing)

ESCAP (1996) *Some problems and issues of older persons in Asia and the Pacific*. Asian Population Studies Series No 144. New York: UN.

ESCAP (1997) *Implications of Asia's population future for older people and in family*. Asian Population Studies Series No 145. New York: UN.

Ng, A C Y, Phillips, D R and Lee, W K M (2002) 'Persistence and challenges to filial piety and informal support of older persons in a modern Chinese society: a case study in Tuen Mun, Hong Kong', *Journal of Aging Studies*, 2002, 16, 1-20.

III BIOLOGICAL AND PSYCHOLOGICAL CONTEXTS OF AGEING

***Hooyman, N. and Kiyak, H.A. (2005) Chapters 3, 5, 6**

*Novak M. (2006) Chapter 6 (Life Span Development)

*Kinsella and Phillips (2005) pp. 18-21

Bond J, et al (2007) Various chapters

Brown, AS (1996) Chapter 4

Foos and Clark (2003) Ch. 3, 5-8, 11

Kart and Kinney (2001) Chs. 4, 5

Open University (1994) Block 2

IV ECONOMIC PERSPECTIVES: PRODUCTIVE AGEING AND ACTIVE AGEING

*Hooyman and Kiyak (2005) Ch. 12 on Productive ageing

*Novak (2006) Ch. 9 and Ch. 10

*Kinsella and Phillips (2005) pp. 28-32, 34-37

Binstock and George (1996) Ch 5.

Kart and Kinney (2001) Ch. 11.

WHO (2002) – see above policy framework on active ageing.

ESCAP (1996) *Annotated bibliography on Productive Ageing in Asia and the Pacific*. Bangkok: ESCAP, UN.

Johnson, P and Falkingham, J (1992) *Ageing and economic welfare*. London: Sage.

Schulz, J H, Borowski, A and Crown, W H (1991) *Economics of population aging: the graying of Australia, Japan and the United States*. NY: Auburn House.

Wise, D A (1992, 1994, 1996) Three books on the economics of ageing. University of Chicago Press.

Teo, P. et al (2006) *Ageing in Singapore*. Ch. 4.(Employment, ageism and work)

Watson Wyatt (Specialists in human capital/financial management, with interests in ageing and employment/pensions etc)

www.watsonwyatt.com

See their *Ageing Workforce 2006 Report: Asia Pacific*

<http://www.globalaging.org/elderrights/world/2006/ageingworkforceap.pdf>

V AGEING AND HEALTH

*Hooyman and Kiyak (2005) Ch. 4, Ch. 13.

*Kinsella and Phillips (2005) pp. 16-21

see especially McCracken, K. and Phillips, D.R. (2005) International demographic transitions, in Andrews, G.J. and Phillips, D.R. (eds.) *Ageing and Place*, Ch. 4 (Chapter is on WebCT)

Bernard and Phillips (1998) Ch.. 14

Bond, J et al (1993) Chapter 1,3,7

Ebrahim, S. and Kalache, A. eds. (1996) *Epidemiology in Old Age*. London: British Medical Association Publishing Group.

Foos and Clark (2003) Ch. 4

Caselli, G and Lopes, A (eds) (1996) *Health and mortality among elderly populations*. Oxford: Clarendon Press.

Chi, I and Leung, E M F (1995) *Towards healthy ageing in Hong Kong*. Hong Kong: St James' Settlement.

Kinsella and Velkoff (2001) Parts 3 and 4.

Lam, S.K. (ed) (1997) *The health of the elderly in Hong Kong*. HKU Press. Chs. 3, 13.

Novak, M. (2006) Ch. 8

Phillips, D R (1988) *The epidemiological transition in Hong Kong*. University of Hong Kong:

Centre of Asian Studies.

Phillips, D R and Verhasselt, Y (eds) (1994) *Health and development*. London: Routledge. Various chapters.

Timaeus, I, Chackiel, J and Ruzicka, L. (eds) (1996) *Adult mortality in Latin America*. Oxford: Clarendon Press. Various chapters.

VI LIVING ARRANGEMENTS: HOUSING AND ACCOMMODATION

*Hooyman and Kiyak (2005) Ch. 9, 10, 11

*Novak (2006) Ch. 11, 13.

*Kinsella and Phillips (2005) pp. 26-28

Andrews, G.J. and Phillips, D.R. (eds.) (2005) *Ageing and Place*. Various chapters.

Ageing International (1997) Special issue, Winter/Spring 1997.

Asia-Pacific Population Journal. Special issue, Dec. 1997, Vol. 12, 4.

Bengtson, V L and Harootyan, R A (1994) *Intergenerational linkages: hidden connections in American society*. NY: Springer.

Hutten, J.B.F. and Kerkstra, A. (1996) *Home care in Europe*. Arena, London. A series of country examples from Europe.

Foos and Clark (2003) Ch. 12 (environments)

Lam, T.P. et al (1998) Community attitudes towards living arrangements between the elderly and their adult children in Hong Kong. *Journal of Cross-Cultural Gerontology*, 13, 3, 215-228.

Ngan, R M H et al (1996) *A study of the long-term care needs, patterns and impact of the elderly in Hong Kong*. HK: City University.

Ngan, R. et al (1997) *Long term care needs, patterns and impact of the elderly in Hong Kong*. Hong Kong Journal of Gerontology, 11,2, 22-27.

Phillips, D R (ed) (2000) Various chapters.

Phillips, D R and Yeh, A G O (1999) *Environment and ageing*. HKU: CUPEM. Phillips, D R (2000)

Long term care. In *Encyclopedia of Sociology*, 2nd ed. Edited E F Borgatta and R J V Montgomery. Vol 3, pp. 1652-1663.