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# PROMOTING CONSCIOUS AND ACTIVE LEARNING AND AGING

HOW TO FACE CURRENT  
AND FUTURE CHALLENGES?

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(COORD.)

## REFLECTIONS FROM A STUDY ABOUT WISDOM WITH STUDENTS FROM A SENIOR UNIVERSITY

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### Abstract

This chapter shows the results of an empirical study about the relationship between wisdom and education carried out with adults from a senior university in Portugal. The study aimed to investigate the answers about wisdom of the retired users attending a Senior University, within the context of the Berlin Paradigm, looking for the relation between these answers and the participants' life paths.

For the data collection, we applied a semi-structured interview and a dilemma of life review to a sample of six subjects with equal distribution concerning gender. All participants showed average-high levels of wisdom (between 4+ and 5+ on a scale of 7 points). From the analysis of the interviews, using the technique of content analysis, it was found that the participants generally indicated several aspects as enhancers of wisdom, namely: a wealth and wide range of experience, mentor practice and generativity. Although the results are consistent with the empirical verification of the rarity of wisdom since the highest level was not obtained they confirm the potential of old age as a positive phase of development and also reinforce the importance of education and learning across the life cycle, so that retirement could be a good and developmental time. Additionally, these advanced-age adults showed that there is plenty of life beyond the retirement frontier and that education in the advanced stages of life considerably improves opportunities for an active and wise aging process.

**Keywords:** Education; Wisdom; Wisdom Berlin paradigm; Advanced adulthood; Senior universities.

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## Introduction

Senior universities have been increasingly capturing people's interest, being sought by a never more numerous public. In Portugal, this movement began especially during the nineties of the last century, and became firmly rooted in the first decade of the 21st century, with senior Universities spread all over the country. In 2012 the number of these institutions was over 190, reflecting on the one hand the increasing senior demand for the many education/training offers and on the other hand the ever growing aging population (Jacob, 2012). Although this world phenomenon represents a great achievement of civilization, since never before has humanity has lived so long, at the same time it has raised new challenges for social organization and demands a new perspective in regard to advanced adulthood (Simões, 2006; Gonçalves & Oliveira, 2011; Depp, Vahia & Jeste, 2012), which can no longer be seen as a minor step of life in terms of importance, meaning and contribution to social welfare.

However, the idea of advanced adulthood as an important stage of development is recent and goes against the most common stereotypes about aging. Illness, inactivity, depression, boredom and incapacities are the most distorted representations associated with old age. This vision brings with it a strong discrimination against older people and affects them from economic, social and psychological points of view, "excluding and denigrating them" (Lima, 2010, p. 25) and, in spite of the fact that people want to live for many years, leads them into not wanting to grow old! However, as a result of scientific research, there is increasing evidence contradicting the negative conception of aging (Fry & Kreyes, 2011; Depp, Vahia & Jeste, 2012).

In this context, a lifelong development perspective advocates that aging is accompanied by losses, but also by gains, with wisdom being at the top in this process of evolution. This idea is very much aligned with the emphasis on positive aspects of human development in recent decades in Psychology, with wisdom standing out among them, in addition to the study of the 'negative variables', like depression or dementia (Oliveira, 2005).

So, as our work was developed from the perspective of education, we considered it of interest to establish explicit links between wisdom, education and learning in old age, via the investigation “Wisdom and education: A study with adults from a Senior University” (Gonçalves, 2010). The aim was to get a better understanding of the wisdom showed by participants in the activities of Senior Universities in the light of the theoretical framework of Baltes et al. (Baltes & Staudinger, 1993, 2000; Baltes & Smith, 2008), namely regarding the identification of enhancer factors of wisdom.

A better understanding of these factors and their supposed influence assumes a great importance in the framework of the European 2020 strategy (European Union, 2012), not only because we know that attenders of Senior Universities are involved in active aging processes, but also because wisdom reflects a life with more meaning and a more open mind towards human and social issues (Simões et al., 2009, 2010). The research took place in the Senior University of Figueira da Foz where answers to the following questions were sought: Do students of this University (who have engaged themselves in active aging strategies) show knowledge related to wisdom? Will we find in these students and in their life paths that which is postulated by theoretical models on the development of wisdom? What dominant characteristics do they have? How have they lived through the transition to retirement and how are they handling this advanced stage of their lives? How do they characterize aging? What role do they see in learning and lifelong education in particular?

## **Education and learning in advanced adulthood**

The concept of education concerns specifically human phenomena, as advocated by Maslow for whom education is a process that is connected to the development of the person and their character, that is, “learning is to learn to grow, to learn in what sense to grow, to learn what is good and what is bad, to learn what is desirable and undesirable, to learn what to choose and what not to choose” (1985, p. 172, cit. by Simões,

2007, p. 33). In this sense, Simões (2007) argues that “education is to act morally” (p. 15) and, therefore, “to educate yourself is to become human, or rather, is to become more human” (p. 34). In a consistent manner, Beloved (2009) sees “education as a path of improvement” (p. 51). So, it seems that there is plenty of convergence concerning viewing education as a moral and ethical dimension, which should always be present in the educational undertaking to be carried out by the educators/trainers (Amado, 2013).

It appears, therefore, that this interpretation of the concept of education is centred in being a better person and acting better, and not as much in knowing more. Thus, it fits well with the condition of human incompleteness and with the need for education and development to be permanent and present across the entire life span. This idea is essential, since only the awareness that we can progress and improve allows the human being to open to educational processes. As Freire (2008) wrote, “being aware of incompleteness, could make me go beyond it” (p. 53). Nevertheless, if it is essential that each one of us remembers this in one’s life, it is even more important for educators and trainers to embrace it.

Although in Western societies, particularly in Portugal, the need for lifelong education has been increasingly proclaimed, the tendency to face one’s lifetime as being strictly compartmentalised persists. That is, the existence of a specific time to study, work and rest continues to structure life in society. Consequently, many adults who reach retirement age no longer expect to study or to work as happened in the previous life stages. This means that social expectations for each phase of the life cycle are different, reflecting a change in social roles performed by elders, as well as in status and power, which are differentiated according to age.

Regarding learning, very elderly adults often express a negative image of themselves. Due to an internalization of stereotypes, age is perceived as a barrier to learning, although research shows that adult life, as a whole, has a huge potential in terms of learning just as in the previous phases (Simões, 1990, 2006; Vandenplas-Holper, 2000; Fry & Kreyes, 2011).

The prevailing negative image of the performance of older people, as well as the low social expectations concerning results of learning tasks,

generate in the elderly the idea that, in fact, they are at a disadvantage compared to younger people. It is a self-fulfilling prophecy, in the sense that older people expect to becoming less competent, which actually comes to occur. In test situations, for example, they tend to suffer an increase in anxiety and at the same time a decrease in confidence, leading to less positive results, thus bringing about the expected failure! In this way, a stereotype is reproduced, reinforcing the idea of an inevitable decline in advanced adulthood (Lerner & Hultsh, 1983; Cerqueira, 2010).

Considering the transformative potential of adult education (Mezirow, 1990, 2000; UNESCO, 2010), adult educators have an important role in the deconstruction of stereotypes (whatever they are) and in fighting against the negative image of advanced adulthood.

## **Wisdom**

The interest in wisdom is very old and ideas about the subject can be found in the Greek and Roman classics as well as in writings of Mesopotamia and ancient Egypt. Thus, the traditions (cultural, philosophical or religious) that honoured and brought it to a status of universality are many (Baltes, 2004; Alves, 2007). However, despite this universal character, wisdom only entered the scientific field at the end of the eighties (of the 20th century) when it captured the attention of Psychology within the framework of the lifespan perspective.

The conceptualization of Baltes and his team from the Max Planck Institute for Human Development and Education of Berlin is situated in that perspective in which development is seen as occurring throughout the entire lifespan, as well as being multidirectional, multidimensional and contextual (Baltes & Smith 2008; Vandenplas-Holper, 2000).

Baltes et al.'s theory is one that assigns a greater weight to the cognitive dimension of wisdom, though not reducing only to it. These researchers have devoted great efforts to the evaluation of wisdom, having developed a theoretical framework and empirical methodology that quantifies performance related to wisdom.

Given the high systematization and attractiveness of their model, as well as clear guidelines regarding its operationalization, this model has captured the attention of experts and researchers from all over the world, and the empirical investigations that have replicated it are already quite significant, which has enabled comparison of the results at the international level. Based on these reasons, our study was developed according to Baltes et al.'s theoretical perspective, which we will briefly present in the following lines.

Wisdom is conceptualized as “a perfect synergy between mind and character, a perfect orchestration of knowledge and virtues, [that] reflects the view that wisdom is more than “cognitive” knowledge. For wisdom to emerge, cognitive, social, and motivational attributes need to converge and form a whole of extraordinary excellence” (Baltes, 2004, p. 20). Thus, wisdom is a complex and dynamic system of expert knowledge, whose evaluation results from the balance of five criteria, namely: 1) factual knowledge about the fundamental pragmatics of life; 2) strategic knowledge about the fundamental pragmatics of life; 3) knowledge about the contexts of life and how these change over time; 4) knowledge which considers the relativism of values and life goals; 5) knowledge about the fundamental uncertainties of life and ways to manage them (Baltes & Smith, 2008). Considering its rarity, it is seen as an ideal.

The investigations carried out by Baltes and colleagues are based on discourse analysis of the subject about several life themes, constituting an opportunity for the demonstration of knowledge in the fields of pragmatics of life, life planning, life management and life review. To assess wisdom-related knowledge, the authors use the thinking aloud method in complex, ill-structured dilemmas, with the answers being recorded, transcribed and classified according to the five criteria mentioned above.

The authors argue that, using the planning tasks, management and life review, access to knowledge levels related to wisdom is possible and they also assume that people answer the dilemmas, at least in part, based upon their experiences (Staudinger, Smith & Baltes, 1994).

Regarding age, research shows that each stage of the life course generates its own knowledge from normative development tasks and from

non-normative events. In this sense, the responses of wisdom are higher when the dilemmas presented are relevant and significant to the person (Baltes & Smith, 2008). Under certain circumstances, age is understood as a facilitating condition of wisdom. However, other factors seem to have more importance for its development, namely: 1) the experience of diverse experiences; 2) the practice of a mentor role; and 3) certain motivational dispositions like interest in others and their understanding.

Research has also shown that profession is an important predictive factor of wisdom, with more weight than intelligence and personality (Baltes & Smith, 2008). On the other hand, in a study carried out in Portugal, it should be emphasized that “older people who find themselves in a situation of retirement and not engaged in any activity, in the form of volunteer work or part-time, give fewer responses of wisdom than seniors who are still inserted into working life” (Marchand, 2005, p. 94).

## **Objectives and methodology of the study**

As mentioned above, this study was intended to analyse the responses of wisdom of retired people (who were attending a Senior University), through life review dilemmas. More specifically we intended: 1) To assess the levels of knowledge related to wisdom of retired senior citizens attending the senior university; 2) To analyse the extent to which factors considered particularly relevant for the development of wisdom in the literature were or not present throughout the lives of these advanced-aged adults; 3) To compare potential wisdom-triggering factors with their answers of wisdom, to be able to identify the underlying factors for an active, educational and wise retirement; 4) To identify relevant factors in the subjects' life stories, capable of helping us understand their engagement in learning activities (mostly informal) during their advanced adulthood.

Data collection took place in the Senior University of Figueira da Foz (centre of Portugal). Six participants equally distributed by sex and with ages ranging from 56 to 70 years were interviewed. Concerning school level, only two of them didn't have a higher education degree.



As for the data collection instruments, a semi-structured interview of an autobiographical nature was used as well as a dilemma of life review.

The interview was intended to provide an exploration of the participants' life course (description of past experiences), as well as to allow reflection on present themes. The interview guide, consisting of six thematic blocks, served as a guideline. The first two blocks were intended to create a welcoming environment and to explain the objectives of the study, as well as to get some demographic characterization data, information about life course and life routines, as well as lifestyle and social support networks. The third block was targeted to understand the learning process in the Senior University, in particular the reasons for enrolment, the expectations that the senior brought with him/her and the evaluation of the University by the seniors up to the moment of the interview.

The fourth block had the objective of identifying the most remarkable events in the life history of the elders, allowing us to check if the factors usually considered as wisdom promoters had or had not been present in the adult life of the old-aged. The fifth block sought to assess the performance of the role of mentor or tutor, also considered as an enhancer factor of wisdom. Finally the sixth block allowed for a completion of the interview, clarifying doubts and thanking them for their participation.

Regarding the dilemma, we opted for life review, in which the participant was invited to express his/her point of view about a life situation of a fictional character who, faced with a striking event, will assess his/her life path. In this regard, vignettes were used with a life review dilemma, developed purposely for this study and previously tested, based on the guidelines proposed by Baltes' team. Below, the dilemma presented to male participants (the dilemma concerning female participants only differs in the sex of the character) is shown as well as the questions raised.

António is 63 years old. He retired at the age of 59, when the factory where he worked reduced the number of workers. Since then, Antonio has not performed any professional activity. One day he met a former co-worker. This colleague, the same age as António, left the factory at the same time and in the same circumstances. However, he decided to

look for new employment and he is now established on his own and intends to work for some time yet. This meeting made António rethink the life that he had taken so far.

The following questions were also raised:

- What aspects of his life can Antonio remember (decisions, problems, solutions, people, feelings, events, obstacles)?
- How can António explain the development of his life and of his actions?
- Looking back on what he had lived through, how can António assess his life? Did he manage to get what he was looking for?

The procedures for applying and rating the dilemma, as well as the instructions and training activities were followed according to the *Manual for the assessment of wisdom-related knowledge*, from Staudinger et al. (1994).

## **Results**

### **Autobiographical interview**

The interviews were subjected to content analysis. The initial reading was developed on the basis of the thematic blocks of the script (vertical reading), allowing the reconstruction of the life story of the participants. In a second step, they were the subject to a horizontal reading, allowing the comparison of reports in order to detect similarities and contact points, as well as differences and oppositions.

The interviews permitted important reflections on various themes, but aspects should be particularly stressed related to retirement, aging and participation in lessons in the Senior University, as well as the importance of being an intentional learner even beyond retirement age.

Retirement was, indeed, a central theme of the interview and, additionally, it functioned as an enhancer of reflection about age and aging,

since it establishes not only the loss of certain social roles, but also represents and symbolizes, socially, entry into old age.

Seeking to realize the extent to which retirement was planned or not, the answers found were varied, some of them revealing that planning had been done at an early age, with a strong investment in active and healthy aging, and others in which planning had not existed. Still, the reports of the participants let us describe a retirement actively lived, with daily and weekly routines, similar to the rhythms of life before retirement. These seniors struggled to have a healthy life and considered themselves useful for their family and friends and to the others, namely through voluntary activities. They were shown to be active and committed to learning processes. Happy, they described retirement as a time for themselves and as an opportunity to occupy their time as they liked most.

*(...) I like being busy during week days; this way I can relate to the people who still work (...)* (B).

*“Yes, I’m retired, but no, that doesn’t mean that I don’t do anything”* (C)

*“I’ve been retired for 3 years now and I feel good, because I do whatever I want. I’m happy, because I feel I’m truly independent but also quite responsible.”*(B)

In the speeches of the interviewees there are also reflections on aging. The changes that happen as age advances are regarded as development and maturity. Human finitude is seen as natural and reflection about the meaning of life seems to gain importance.

*“I don’t feel I’m getting old, I’m rather maturing every day (...) To me, my current age (halfway near death) is a reality that I obviously accept. Physiologically, it can’t be denied! Being born, growing up and dying.”*(C).

*“Growing old is growing mature. To me, age doesn’t matter: as people often say, youth is eternal.”*(C)

The evaluations, perspectives and feelings about the Senior University assume a great importance in the context of this research. It was

found that all participants made a very positive assessment of this institution, openly recognizing its contribution towards healthy and active aging. The teaching activities were valued to the extent that they helped seniors remain intellectually active. Classes and extracurricular activities, such as study tours, exhibitions and books were valued and understood as having a dual purpose: learning and conviviality. Although nowadays senior universities are seen especially as a leisure occupation strategy, the speeches of these adults were clear concerning their great appreciation of learning and strong self-awareness about themselves as learners.

*“They are not really lessons, but rather lectures, where we’re all together discussing different things that just come with the flow: books, theatre, cinema, politics, this and that, about everything. This hour and a half of lecturing and dialogue is really nice.” (B)*

*“The university helps us understand life and problems. (...) We continue to be autonomous and this is essential, if we want life to continue.” (C)*

*“Digital photography. I’m enjoying it very much. (...) I also like Spanish, English and History (...)”(B)*

### **Life review dilemma**

Regarding life review dilemma, after its transcription, the rating process took place via a seven-point scale, according to the five criteria mentioned above. The ratings were done by the main author, and by two researchers familiar with the lifespan perspective. The answers to the dilemmas were assessed and reviewed twice by the judges, with the aim of reducing the margin of subjectivity in the transformation of qualitative material into quantitative evaluation. Accordingly, ratings for each criterion resulted from the computed average of the three judges. Global ratings were also obtained by calculating the average of the 5 criteria, shown in table 2.

**Table 2:** Results of the life review dilemma

<i>Wisdom criteria</i>	<i>Participants</i>					
	B	C	D	E	F	G
Factual knowledge about the fundamental pragmatics of life	6	5	5	5	6	5
Strategic knowledge about the fundamental pragmatics of life	5	4	4	4	5	4+
Knowledge about the contexts of life and how these change over time	5	4+	4	5	6	4
Knowledge which considers the relativism of values and life goals	5	5+	5	4	5	5
Knowledge about the fundamental uncertainties of life and ways to manage	5	5	5	-	6	4
<i>Results</i>	5	5	4+	4+	5+	4+

Considering the results of the six participants, three obtained a rating of 4+, two obtained 5 and one 5+, which means that they all showed at least a medium level of wisdom knowledge.

## Discussion

This research intended to verify the levels of wisdom shown by students of a Senior University and its relationship with the aging process, as well as with educational and learning activities. Given the rarity of wisdom responses observed in previous investigations, we consider the results particularly interesting, since all participants showed at least average levels of wisdom. We think that this was only possible due to the special particularities found in the participants, not only because they tended to characterize their life as rich and full of challenges, but also by seeing learning as necessary and essential, even in the more advanced stages of life.

A global analysis of the interviews allows us to highlight three aspects which appear to be common to all respondents. Firstly, everyone seemed to have a financial income sufficient and adequate to their needs and expectations, allowing them access to goods and services, such as health care, recreation, vacations and even to the Senior University itself, which requires the payment of tuition fees. Secondly, we stress the overall good

state of health of the elders. In speeches a concern with the maintenance of an overall well-being through health care, healthy eating habits and sport practice was consistently found. Finally, we stress the importance of social support networks as reported by the participants.

Contact with other people seemed to increase the well-being of respondents, namely family and friends. These respondents were, in general, involved in various activities, including volunteering, which was evaluated very positively and which pointed to a factor that has been regarded as a wisdom-enhancer – interactions with significant others. This is particularly important because leaving the labour market usually tends to decrease the level of people's interactions, but it was not the case in the lives of the participants studied.

With regard to the educational phenomenon, we could see that respondents not only were intentionally involved in learning processes, even after leaving the labour market, but they also were well aware of their learning capabilities. And more! For these seniors, learning was approached as a necessity and not as a mere hobby! Because of their active involvement in learning processes, they contribute to a fulfilled advanced adulthood. The cognitively stimulating University environment, together with meaningful and useful learning, helped them to continue to live in a healthy and rewarding way.

We have argued that the person's development towards more humanity is intrinsic to the concept of education, with a strongly moral and ethical dimension inherent in this phenomenon. This issue is inseparable from human incompleteness itself and came to light in the interviewees. However, the idea of education as a lifelong process is not yet a full reality, nor are its benefits well known by all people of advanced age. That's why adult educators have an important role to play so that the last stages of life could be lived in fullness and in a wiser manner. For this purpose, beyond community service and health care activities, investment in education and learning needs to be present, although love of being a continuous learner should be cultivated across the entire lifespan.

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