

WE STILL HAVE A LOT TO LEARN: LEARNING EXPERIENCES OF INDIVIDUALS
AGE 80 AND OLDER IN CARE FACILITIES IN A MIDWESTERN STATE

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By Sheila Grebert

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DEDICATION

To my parents,

Thank you for all that you are and all you raised me to be.

Dad, I wish you could have been here to see me complete this journey. And no, this does not mean I can prescribe medication; I am not that kind of doctor.

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ABSTRACT

This qualitative study focused on the learning experiences of individuals, age 80 and older, in care facilities in a Midwestern state. Even with the well documented growth of the over age 85 demographic, there are few studies about learning that included this demographic or considered the wants and needs of this group. Using a phenomenological research approach, participants for this study were purposefully selected from two rural and two urban care facilities. These participants took part in three semi-structured interviews. The first included questions about their life history, the second focused on their current learning activities, while the final interview provided time for the participants to reflect on the meaning of learning within their lives. Additional data was collected through observing learning activities at each of the participating facilities. By using the constant comparative data analysis method along with open and focused coding, four themes emerged from the data collected: overwhelming participation in both non-formal and informal learning, learning through travel and exercise, motivation for learning: cognitive interests and social aspect, and positive impacts of learning in later life.

The importance of continuing learning activities in later life was overwhelmingly supported by the findings of this study. The participants in this study were active, able, and learning daily. They all provided images of individuals over 80 who are successfully aging and living. With a lack of research that includes the over age 85 demographic, the findings of this study call for a start to building a better understanding of the impacts of continued learning with the oldest of the old.

Chapter 1:

INTRODUCTION

The fastest-growing age group in the country is not the middle aged. Even with the first baby boomers turning 65 this year, the fastest-growing age group includes individuals 100+ while the second fastest-growing age group is over 85 (Rand, 2010). According to transgenerational.org, the growth rate of individuals over 85 is two times higher than those 65 and over and almost four times higher than the growth rate for the total population. The over 85 age group is a tiny percentage of the overall U.S. population, but they represent the fastest growing segment (Hobbs, n.d.). Those over 85 will more than triple from 5.7 million in 2010 to over 19 million by 2050 (“Characteristics,” n.d.). According to Hobbs, from 1960–1994 the age group 85 and above, referred to as the oldest of the old, increased by 274 percent. In comparison, persons 65 years old and over increased by 100 percent with an increase of 45 percent for the total population. Moreover, those 100 or older, referred to as centenarians, grew from 37,306 people, 1 in every 6,667 of the U.S. Population in 1990, to 50,454 representing 1 in 5, 578 in the population as of 2000 (U.S. Census Bureau, 2001). Predictions by the U.S. Census Bureau (2008) estimate the number of centenarians to grow to over 600,000 by 2050.

As these predictions indicate, the rapid growth of those over 80-85 is expected to continue. The U.S. Bureau of Census (2010) reported the life expectancy in 2007 as 77.9 and projected the life expectancy to be 78.3 in 2010. Future predictions also demonstrate the continued trend of rising expectations with the predicted life expectancy in 2020 as 79.5. Of critical importance, is that people are not only living longer, they are living longer in good health (Chen, Kim, Moon, & Merriam, 2008). As older adults remain in good health longer, they continue to seek ways in which to maintain their quality of life. Quality of life could include

engagement in learning activities, both formal and informal educational pursuits, recreational activities, and social events to name a few.

Background

Importance of Learning

The importance of learning activities and education in this quest for continued quality of life cannot be understated. Granick and Friedman (1973) summarized the value of education to the aged when they stated:

It seems self-evident that education acts as a stimulus to the individual's capabilities and that the exercise of these capabilities is likely to maintain, and even increase, their functional effectiveness. Conversely, the failure to use one's intellectual capacities on a regular and extensive basis may lead to a sort of intellectual atrophy and rapid deterioration of the ability to perform even elementary mental tasks. (p. 63)

Other researchers have documented the positive impacts learning has on life satisfaction (Cusack, Thompson, & Rogers, 2003; Shapira, Bark, & Gal, 2007; White et al., 1999) and increased engagement and connection to the world, (Duay & Bryan, 2008). With the evidence to support the benefits of continued learning, what is being done to provide learning opportunities to the oldest of the old?

Gaps in Current Research

Although there are a large number of research studies about older adult learners, the definition of older adult learners typically does not include the 85 and over demographic. Chen et al. (2008) reviewed 93 articles about older adult learners in adult education journals from 1980 – 2006 and found a variety of terms used to describe the older adult learners: the elderly, elder, older adults, old people, seniors, the aging, and retired. The terms used in the studies were not

the only inconsistencies noted. They also noted an inconsistent use of age. Many articles did not define the age range used within the study while others used ages as young as 50 – 55 to identify the older adults. The median age used for older adult learning research reviewed for this study ranged from 56 to 82.65 (Adams, 2002; Namazi & McClintic, 2003) with one study regarding centenarians, which included 18 participants ranging in age from 100-106 (Fenimore, 1997). There are, however, additional terms used that typically do include the over 85 demographic such as: old old, oldest of the old, very old, frail, octogenarians, centenarians, or learning in late life, but the studies with this age demographic typically focus on medical aspects of aging versus educational needs (Kliegel, Moor, & Rott, 2004; Navarro et al., 2009; Ranberg-Anderen, Vasegaard, & Jeune, 2001).

This lack of consistency in terminology and the age demographic being considered illustrates the importance of determining what the term older adults will mean in this study. Therefore, this study defined older adult learners as those 65 and above, which typically does not consider those over age 85, and defined the oldest of the old adult learners as those age 85 and over. This study concentrated on exploring the learning experiences of individuals over 80, which includes older adult and the oldest of the old adult learners, who are often overlooked in the older adult learning research in spite of the well documented growth rate.

This study also attended to learning activities that include both informal and non-formal learning, another gap in the current research. Chen et al. (2008) found that much of the older adult learning research they reviewed focused on participation in formal education even though according to the U.S. Bureau of the Census 2005 (as cited in Chen et al., 2008) less than one percent of adults over the age of 65 enroll in formal educational programs within a school setting. According to Chen et al. more research needs to be done on learning that takes place

outside the school setting called non-formal or informal learning. Non-formal or informal learning could be provided by churches, community centers, or many other organizations, without the older adult learner returning to the formal school setting. Chen et al. referenced the U.S. Bureau of the Census (2005) statistic that only one percent of those over 65 return to formal education. If only one percent of those age 65 return to formal education, the likelihood of the 80 and over demographic returning to formal education are very low. With this in mind, this study focused on the non-formal and informal learning that occurs with older adults age 80 and over.

Statement of the Problem

With the growing number of individuals 80 and over and the importance of continued learning in order to maintain one's intellectual capacities (Granick and Friedman, 1973; Jarvis, 2001; Paggi and Hayslip, 1999; Schneider, 2003;), it is imperative that continued learning activities are available to these individuals. The research, however, on educational needs and learning activities of older adults rarely includes this age demographic (Chen et al., 2008; Jarvis, 2001). This accentuates the importance of this study.

Purpose of the Study

The purpose of this study was to explore the learning experiences of individuals, age 80 and over, in care facilities in this same Midwestern state. This study was accomplished by in-depth interviews with selected older adults, review of learning activities scheduled by selected care facilities and observation of learning opportunities in which the older adults participate, when applicable.

Research Questions

The overarching research question was: What are the learning experiences of individuals, age 80 and over, at care facilities in a Midwestern state? To help answer this question, the following questions were answered:

1. Is the focus on non-formal learning, informal learning or a combination of the two?
2. Why do the participants continue to participate in learning experiences?
3. What is the impact of continued learning on life satisfaction and quality of life?
4. Is experience of learning in later life different than the experience of learning during other times in their lives?

Significance of the Study

As the population continues to age, and age in good health, it is vital we understand the older adult learners' changing educational needs and provide learning opportunities to meet these needs. Continued learning promotes increased life satisfaction for the older adult learners (Cusack, Thompson, & Rogers, 2003; Shapira, Bark, & Gal, 2007; White et al., 1999) and increased engagement and connection to the world (Duay & Bryan, 2008), which benefits everyone. However, there is little research about the experiences of older adult learners and what they want or need from learning activities (Boulton-Lewis, 2010). In fact, the voices of the older adult learners themselves are largely ignored in the current research (Withnall, 2006). This highlights the importance of this study, and the need to better understand the learning experience of these individuals and allow them an opportunity to have their voices heard.

Conceptual Framework

The importance of theory in qualitative research is well documented (Ambert, Adler, Adler, & Detzner, 1999; Marshall & Rossman, 1989; Merriam, 1998). According to Marshall and Rossman's (1989) Model of Research Cycle, qualitative researchers should be guided by theory throughout the entire research process. The Model of Research Cycle begins with theory, which can include both personal or tactic theory and formal theory, to help bring the research question into focus and frame the topic. Once the topic and research questions are established, the Model of Research Cycle outlines the need for the researcher to continue to draw from the theory, conceptual framework, throughout the remaining steps within the research process (Marshall & Rossman). Similarly, Merriam (1998) explained theoretical framework as an essential part of any study, guides every aspect of a study from how to frame the research questions to how the data collected was interpreted. Ambert et al. (1999) agreed as they stressed the importance of interweaving theory, data, and methods with qualitative research.

With the importance of a conceptual framework in mind and the desire to understand older adult learners' experiences, it is important to understand the learning needs, motivations, and characteristics of adult learners. To do this, the concept of self-planned or self-directed learning, Knowles' model of adult learning, referred to as andragogy (Knowles, 1984), and Boshier's (1978) modified six-factor model regarding older adult learners' motivation was used throughout this study as a frame of reference in which to view the current research and the data collected and reviewed.

Self-Directed Learning

Self-directed learning was first explained in detail by Tough who referred to it as self-planned learning (Merriam, Caffarella, & Baumgartner, 2007). Tough (1979) described a

learning project as “a major, highly deliberate effort to gain certain knowledge and skill (or change in some other way)” (Tough, p. 1) and found that about 70% of all learning projects were planned by the learner. Knowles (1975) also saw the importance of self-directed learning and included this concept as one of the assumptions of andragogy.

Andragogy

According to Knowles, the way in which adults learn, andragogy, is different from how children learn, which is referred to as pedagogy. Knowles compared the assumptions about learners in the pedagogical model to those assumptions about adult learners in his andragogical model. The pedagogical model sees a learner as a dependent person who carries out the teacher’s direction and becomes ready to learn when the teacher tells the learner when and what to learn. The learner has a subject-centered orientation to learning and is primarily motivated by external factors. In contrast, the andragogical model sees learners as self-directed persons who become ready to learn when they have a need to know or do something. The learner who is task-centered or problem-centered, is learning in order to be able to solve a problem or perform a task and is motivated by both internal and external motivators (Knowles, 1984). Chapter 2 goes into greater detail about andragogy (Knowles, 1984).

Adult Learner’s Motivation

Along with the learning needs and characteristics of adult learners, adult learners’ motivation to learn is important to understand. Boshier’s (1978) six-factor model, which was modified to include escape/stimulation, social welfare, social contact, and cognitive interest for use when considering older adult learners motivations, was also used as a frame of reference throughout the study.

Chapter 2 goes into greater detail about the learning needs, motivations, and characteristics of adult learners.

Assumptions

The major assumptions used throughout this study included:

1. The participants in the study provided honest responses to all interview questions.
2. The participants selected for this study provided an accurate representation of older adult learners involved in learning activities provided by care facilities in this Midwestern state.

Limitations and Delimitations

This study was based upon older adult learners over the age of 80 who participate in learning activities provided by care facilities in a Midwestern state. The number of participants in the study and the phenomenological approach used in this study limits the ability to generalize the results beyond the specific group of individuals involved in the study. Purposeful sampling was used to secure participants the care facility staff felt would be good candidates for this study, these individuals may not be representative of the entire population of individuals over 80 in care facilities. The intent of the study is to understand the learning experience of the specific participants involved in the study, rather than to generalize about learning experiences of all older learners.

Definition of terms

Andragogy: learning strategies for adult learners.

Baby boomers: The generation born from 1943 – 1960.

Care facility: facilities to include independent living, assisted living, and nursing home facilities.

Centenarian: person 100 year old or older.

Educational gerontology: learning in older adulthood. Also referred to as gerontagogy or eldergogy.

Eldergogy: learning in older adulthood. Also referred to as educational gerontology or gerontagogy.

First age: childhood and early socialization in which a person is dependent on others.

(Laslett,1991)

Formal learning: “the institutionalized, chronologically graded and hierarchical education system” (Jarvis, 1986, p. 3)

Fourth age: final dependency, decrepitude and death. (Laslett,1991)

Gerontagogy: learning in older adulthood. Also referred to as educational gerontology.

Incidental learning: “the process whereby every person acquires knowledge, skills, attitudes and aptitude from daily living” (Jarvis, 1986, p. 3). Also referred to as informal learning.

Informal learning: “the process whereby every person acquires knowledge, skills, attitudes and aptitude from daily living” (Jarvis, 1986, p. 3). Also referred to as incidental learning.

Learning activities: for the purpose of this study this term refers to both informal and non-formal learning. This could range from the process of acquiring knowledge, skills, or attitude from daily living to participating in any organized educational activities provided outside of the formal system such as classes offered through community education centers or churches.

Life Satisfaction: Lemon, Bengston, and Peterson (1972) define life satisfaction as “the degree to which one is presently content or pleased with his general life situation” (p. 513).

Non-formal learning: “any systematic organized, educational activity carried on outside the formal system to provide selected types of learning to particular subgroups of the population”

(Jarvis, 1986, p. 3). This could include classes offered through community education centers or churches.

Octogenarian: person in their 80s

Older adults: for this study this term refers to learners aged 65 and over, which rarely includes those over 85.

Oldest of the old adult learners: for this study this term refers to learners aged 85 and over.

Pedagogy: learning strategies for children.

Second age: adult maturity characterized by individual's pursuit of career and financial gain.

Typically concerned with forming their own families and taking responsibility for others.

(Laslett,1991)

Self-directed learning : learning where the learner selects, directs, and controls the learning and the learning process.

Third age: no longer have responsibilities of second age, have more autonomy and self-fulfillment. Often a person can develop more cultural interests and seek enhanced life satisfaction. (Laslett,1991)

Organization of Study

This dissertation includes five chapters: introduction, review of literature, methodology, findings, and conclusion. Chapter 2 is a review of the literature used to establish this study's research questions, purpose, methodology, and assumptions. It includes additional information about andragogy, experiential learning, and discusses the current literature about older adult learning and the gaps that exist in the literature. Chapter 3 explains the methods used to perform this research; from the philosophical assumptions that guided the research design to

how the data was analyzed. Chapter 4 provides the findings while Chapter 5 discusses the implications of the results and make recommendations for further additional studies.

Chapter 2:

REVIEW OF LITERATURE

A vast amount of literature exists about older adult learners ranging from whether older adults can learn (Kolland, 1993; Merriam & Caffarella, 1999; Paggi & Hayslip, 1999), to the impact educational activities have on life satisfaction (Cusack, Thompson, & Rogers, 2003; Shapira, Bark, & Gal, 2007; White et al., 1999) and to older adults' participation in educational activities (Fisher, 1986; Heisel, 1985; Ostiguy, Hopp, & MacNeil; 1997; Swindell, 2002). However, this study included the oldest of the old adult learners and their experiences with learning activities in later life. There is little research focused on the older adult learners' experiences especially with the over age 85 demographic. Due to the limited research available about the learning experiences of the oldest of the old, the literature review discusses learning research about older adult learners and explores the following five areas within the older adult learning and oldest of the old literature: andragogy, research about older adult learners and the discipline of gerontology, practical applications for older adult learning, impacts of learning in later life, and older adults' participation in learning activities. As part of the review the researcher examined the definitions and categories used to describe who older adults are.

Who Are Older Adults?

A variety of terms are used to describe older adults: the elderly, elder, older adults, old people, seniors, the aging, and retired (Chen et al., 2008) as well as old old, very old, frail, and oldest of the old. There are multiple ways in which these terms have been defined and much discussion about the ages that correspond to these different terms. Using chronological age can be misleading due to the differences in cultural variations and individual developmental variation (Findsen, 2005). Laslett (1991) described the traditional use of chronological age and the

stereotypes associated with age as a “damaging misclassification” (p. 3). Rather than using chronological age to categorize individuals, Laslett suggested four stages: first age, second age, third age, and fourth age. First age begins at birth and lasts about 20-25 years; it is characterized by physical and financial dependency. Second age is adult maturity, which includes securing a job, getting married, and having the other responsibilities of adulthood. The time spent in this age varies, but typically ends when the individual retires from paid work. This transition to retirement, which is not age dependent, typically begins the third age stage. This stage is characterized by an active pursuit of interests the individual was unable to commit to in the second age due to multiple responsibilities. With the growing expectation of longevity, the third age could last as long as 25-30 years and could provide a time for unparalleled growth and spiritual renewal. The final stage, the fourth age, is a time of illness, frailty, and dependence. This stage can come at various ages or not at all. Depending upon the individual, some spend years in this stage while others may never reach this stage.

The use of developmental stages, rather than age, to categorize adulthood was also used by Fisher and Simmons (2007) to describe the five periods within older adulthood: continuity with middle age, early transition, revised lifestyle, later transition, final period. These categories, characterized by periods of stability interrupted by transition periods, move the older adult into each new stage, until the final period. According to Fisher and Simmons, older adulthood is not a single life stage, rather it should be divided into five stages independent of age. Fisher and Simmons explained that individuals typically enter older adulthood at retirement with the first stage called continuity with middle age. This stage is characterized by middle life continuation and the pursuit of retirement goals. The older adult finds other activities to replace prior work duties and continues to function as they did prior to entering retirement and older adulthood.

This period is followed by early transition, which represents an involuntary or voluntary transitional event such as the death of a spouse, ill-health, or the need to move. Due to these voluntary or involuntary changes, older adulthood takes a new direction. This is often seen as the transition away from the middle age lifestyle. The older adult emerges with what Fisher and Simmons called a revised lifestyle: the third stage in older adulthood. The older adult emerges from the early transition with an adaptation to the transition and socialization within the older adult age group and stable lifestyle consistent with the older adult status. The next stage reached is the late transition, which moves the individual out of the older adult lifestyle due to a loss of autonomy, health, or mobility. As older adults begin to cope with the new limitations found in the late transition stage, they reach the last stage in older adulthood: final period. The final period is characterized by adaptation to changes in the late transition, an opportunity for continued activities and revised goals based upon current abilities, and a sense of mortality (Fisher and Simmons, 2001).

In contrast to the stage or period classifications, others have tried to define older adults by using chronological age as a way to categorize. Neugarten (1978) explained two categories for the older adults: young-old (aged 55-75) and the old-old (aged 75-85). While Lamdin & Fugate (1997) used the terms young old for those aged 55-65, middle old for 66-75, old-old for those 76+, and in some cases the oldest old for those over 85.

While there are multiple ways to define and categorize older adults and older adulthood, the intent of this literature review is to primarily investigate learning for those individuals in the third and fourth age, also referred to as either the middle old, the old old, or the oldest of the old.

Andragogy

Exploring how older adults learn will begin with a discussion about andragogy, “the art and science of helping adults learn” (Knowles, 1990). According to Knowles, the way in which adults learn, andragogy, is different from how children learn, which is referred to as pedagogy. Knowles (1984, 1988, 1990) explained these differences by looking at several assumptions about adult learners and how these assumptions compared to the pedagogical model.

The first assumption is about the need to know. Adults need to know why they need to learn something; how the learning is going to benefit them and what the consequences are if they do not learn it. While the pedagogical model assumes learners do not need to know how they will apply learning to their lives they only need to know that they must learn if they want to pass or get promoted. (Knowles, 1990)

The self-concept of the learner is the next assumption. Adults see themselves as responsible for their own decisions and self-directing while children are often seen as dependent (Knowles, 1990). According to Knowles,

The pedagogical model assigns to the teacher full responsibility for making all decisions about what will be learned, how it will be learned, when it will be learned, and if it has been learned. It is teacher-directed education, leaving to the learner only the submissive role of following a teacher’s instructions. (p. 54-55)

In contrast, the andragogical model makes the assumption that adult learners are responsible for their own actions and are self-directing (Knowles, 1990). The teachers’ role moves from director of all activities to one of facilitator, a partnership between the teacher and the adult learner without the formal status differentiation. The learning climate is one that is safe and accepting where the adults feel accepted, supported, and respected (Knowles, 1988).

The role of the learners' experience is also different between the pedagogical and andragogical models. Adult learners enter learning activities with a greater amount and variety of experiences than children (Knowles, 1990). These life experiences provide a valuable resource that should be tapped into. Therefore, various experiential techniques and practical application opportunities allow learners to share and utilize their life experiences to solve problems. This could include group discussion, problem-solving activities, case studies, and scenario based activities (Knowles, 1988).

Another difference is found with the readiness to learn. Children typically become ready to learn when they are told they have to learn, while adults become ready to learn when they understand why they need to know or do something (Knowles, 1990). This realization that learning is needed can occur with any change in a person's life such as loss of job, death, divorce, but can also be triggered by demonstrating to the learner why the learning would be beneficial to them (Knowles, 1984).

Orientation to learning is another difference. Children have a subject-centered orientation to learning while adults have a life-centered orientation (Knowles, 1990). Adults are motivated to learn when they see the learning will help solve a problem they are currently facing. They are task or problem-centered and learn most effectively when learning activities and examples use real-life situations in which they can apply their new learning (Knowles, 1990).

How children and adults are motivated is the final difference. Children are typically motivated by external factors such as parents, teachers, and grades. In contrast, adults' primary motivators are internal motivators. Adults are motivated by external factors such as promotions and better jobs, but the most potent motivators are internal motivators such as self-esteem, quality of life, or increased job satisfaction (Knowles, 1990). (See Table 2.1)

Table 2.1

From Pedagogy to Andragogy

Assumptions	Pedagogical Model	Adragogical Model
The need to know	Don't need to know how they will apply to their lives, just need to know that must learn to pass.	Need to know the benefits of learning something and why they need to learn it before they learn.
The concept of the learner	The student is a dependent personality. The teacher has full responsibility for making all the decisions about the learning. The role of the learner is to carry out the teacher's directions.	The adult learner is self-directing.
The role of the learner's experience	Students enter with little experience.	Adults enter with a great volume of experience.
The readiness to learn	Students become ready to learn when they are they are told that they have to learn in order to advance to the next grade level.	Adults become ready to learn when they understand a need to know or do something.
The orientation to learning	Subject-centered orientation to learning. They see learning as a process of acquiring specific content.	Life-centered, task-centered, or problem-center. Adults do not learn for the sake of learning, they learn in order to be able to perform a task, solve a problem, or live in a more satisfying way.
The motivation to learn	Students are motivated primarily by external pressures from parents and teachers, competition for grades, or the consequences of failure.	Adults are motivated by external motivators, but more potent motivators are internal such as self-esteem, recognition, better quality of life, and greater self-confidence.

Note: Adapted from Knowles (1984, p. 8-13; 1990, p 55-65)

Older Adult Learners and the Discipline of Gerontology

While andragogy focused on the characteristics of adult learners and how to best engage adult learners in the learning process, many researchers feel older adults have different needs than those of adult learners (Battersby, 1987; Glendenning, 2000, 1992; John, 1988; Lamdin, 1997). A review of the contributions made to the discipline of gerontology includes the fields of study such as educational gerontology, geragogy, and gerontagogy: these will assist in the discussion of older adult learning needs.

The discipline of gerontology, the study of human aging, has generated a plethora of terms and fields of study about older adult learning. Educational gerontology has become widely recognized as the term used to refer to older adult or elderly learning and teaching (Arguso, 1978; Cusack, 1999; Glendenning, 2000; Peterson, 1976). However, educational gerontology includes much more than just the learning and teaching of older adults; it encompasses a variety of disciplines and areas for research and theory development. Therefore, additional researchers have tried to carve out an area of study that focuses specifically on the learning and teaching of older adults. Other terms used to explain this specific area of focus include: geragogy/gerogogy (Battersby, 1987; Glendenning, 1992; Hartford, 1978; John, 1988; Maderer & Skiba, 2006; Ruth, Sihovola, & Parvianiene, 1989) eldergogy (Yeo, 1982), and gerontagogy (Lemieux & Martinez, 2000). Critical educational gerontology is yet another field of study within educational gerontology that primarily focuses on the empowerment of older learners (Cusack, 1999; Glendenning, 2000; Winthall, 2000). While the researcher acknowledges the importance of this aspect of older adult education in the field of educational gerontology, this was beyond the scope of this study and was not addressed.

Educational Gerontology

Educational Gerontology is a term originally used in 1970 at the University of Michigan as the title of a doctoral program in the School of Education (Peterson, 1976). First defined as “the study and practice of instructional endeavors for and about aged and aging individual” (Peterson, 1976, p. 62). Educational gerontology was further described as a combination of adult learning theory and social gerontology (Peterson, 1976). Educational gerontology includes three interrelated aspects: education for older persons, education for the public about aging, and educational preparation of persons who work in servicing older people in professional or paraprofessional capacities (Peterson, 1976). Peterson (1980) provided additional description about these three aspects by creating a matrix that included these three aspects, which he referred to as instructional audiences, and how each of the three are studied and applied in practice, which he called the function. (See Table 2.2)

Table 2.2

Educational Gerontology Categorization

Function	Instructional audiences		
	Instruction of older people	Instruction about older people	Instruction of professionals and paraprofessionals
Study	1. Instructional gerontology	3. Social gerontology	5. Gerontology education
Practice	2. Senior adult education	4. Advocacy gerontology	6. Professional gerontology

Note: From Peterson (1980), p.69

With the addition of the function category, which included study and practice, to the instructional audiences' category, Peterson's matrix created six components. These components represent the major elements of educational gerontology. Each component was named and defined to provide a detailed description of all that was educational gerontology (Peterson, 1980).

By looking at Peterson's (1980) categorization of educational gerontology, the two components aligned most closely with the purpose of this study are the two that address the study and practice of instruction of older people: instructional gerontology and senior adult education.

Instructional gerontology.

The focus of instructional gerontology is expansive; it ranges from research about the educational desires and wants of older people, cognitive issues of older people and their ability to learn, to the effectiveness of various instructional methods (Peterson, 1980). However, according to Peterson (1980) much of the research in this area has focused on intellectual changes in older adults and relatively little work has yet been completed in the number of other areas such as desires and wants of older adults. Moreover, Peterson (1980) pointed out that the most critical need was for a researcher to bridge the gaps between laboratory studies of learning and the classroom, as few findings have been applied to classroom situations.

Senior adult education.

Unlike the application gap identified in instructional gerontology research, senior adult education has been employed throughout the years and continues to grow in popularity. Peterson defined senior adult education as the actual teaching of older people, which included planning and conducting education in order to increase the learners' skills and knowledge to ultimately allow them to enjoy life more (Peterson, 1980). This is the function most people think

about when they use the term educational gerontology (Peterson, 1980). This is the application of older adult learning, which includes assessing the needs of older adults, designing the curriculum, evaluating the programs, and recruiting and training faculty. This field has grown dramatically in the past few decades with the emergence of a variety of learning institutions and learning opportunities for older adult learners such as University of Third Age often referred to as U3A, Elderhostels, colleges for seniors, and the many adult and community education centers and classes.

Remaining four components of educational gerontology.

The remaining four components of educational gerontology focus on the study and practice of instruction about older people and the study and practice of those who work with older people. Social gerontology is the study of instruction about older people, the stereotypes, perceptions, and attitudes that exist about older adults and how to educate the public about these issues. Advocacy gerontology is the actual practice of increasing public awareness about older adults in an effort to improve the conditions in which older people live. Gerontology education is the study of instruction of professionals in the geriatric fields and the actual practice of preparing these professionals is referred to as professional gerontology (Peterson, 1980). Though not closely tied to the purpose of this study, these four components help demonstrate the overwhelming amount of information represented by Peterson's (1980) description of educational gerontology.

In his early works, Glendenning (2000) refined the description of educational gerontology by using the term gerontology education to clarify Peterson's four components, which were not closely related to the instruction of older people. Glendenning used the term educational gerontology when discussing the instruction of older people: instructional

gerontology and senior adult education. Yeo (1982) also discussed the need to specifically focus on instructional gerontology and senior adult education to identify the specific function of teaching older adults, but he proposed the term eldergogy for this area of focus.

Gerogogy

Hartford (1978) had similar ideas and introduced the term gerogogy, also known as geragogy. Hartford believed the next step of education from pedagogy to andragogy was gerogogy, which he defined as the education of and by the elderly. Hartford described the components of gerogogy to include: self-pacing, social interaction, activity based, focus on the talents of each learner, and continuous learning. Battersby (1987) continued the use of the term gerogogy, but felt the field should be developed further based upon research in human development of older adults, teaching of older adults, and learning of older adults. John (1988) also used the term gerogogy to describe the process involved in stimulating and helping the elderly person learn. However, John defined the elderly as “persons who cannot function without assistance in society; although they once could do so, age-related factors now prevent their complete independence” (p. 14). This limited definition of elderly caused some researchers to see the term gerogogy as an extremely narrow field of study for the dependent elderly population.

While John’s definition of elderly deterred some researchers from using the term gerogogy, other researchers continued to use the term with expansive definitions such as Glendenning (1992)

Gerogogy or geragogy refers to those issues and practices that are relevant to teaching and learning in relation to older people: memory, cognitive development, coping with transition and change in later life, teaching theory and method, learning

theory, realization of full developmental potential and a philosophy which underpins the whole conceptualization as being controlled by the person concerned” (p 15).

Gerontagogy

Gerontagogy is another term used to study teaching and learning in later life (Lemieux & Martinez, 2000). Lemieux & Martinez divided the field of educational gerontology into geragogy and gerontagogy. Geragogy is concerned with the instruction of elderly presenting deficits while gerontagogy is the part describing the learning of the elder based upon education versus geriatrics.

Applying educational gerontology, gerogogy, or gerontagogy

While there has been much discussion about the variety of terms describing older adult learning and the use of these terms, research is limited in other areas of older adult education. Research has been insufficient regarding the desires and wants of older people, effectiveness of various instructional methods, or the characteristics of the models and delivery system in the education of the elderly (Peterson, 1980). Furthermore, there have been few studies of learning in the classroom of older adults (Peterson, 1980). Researchers need to design studies that produce results applicable in the educational settings as there are currently few implications for practice (Browning, 1995).

In contrast, andragogy provides a framework for application that is unavailable in current research from the discipline of gerontology. While older adults may present unique needs due to physical changes in later life not addressed within andragogy, the concepts in this model can and should be utilized when designing and delivering learning activities for older adult learners (Peterson, 1983). For example, according to Browning (1995), it is vital for those involved with

the education of older adults to draw on the expertise, experiences, and skills of older adults in the design and delivery of any educational activities. This promotes a partnership between the educator and the older adult and the ultimate empowerment of the older adult. Browning's description for what is needed with older adult learners aligns with andragogy. Peterson (1983) argued that geragogy is not practical or necessary, and stressed how the concepts of andragogy may be utilized in the education of older adults. Peterson (1983) stated, "With the reminder that health, perceptual, and energy changes must be considered, it is the contention here that the instructional conceptualization called 'andragogy' offers a great deal of insight and usefulness when considering education of older people" (p. 149).

Therefore, andragogy provided the lens through which the researcher used when making observations in this study. Attention was also paid to any unique needs demonstrated by the older adult learners during the researcher's observations and interviews.

Figure 2.1

Summary of Research, Terminology, and Concepts about Older Adult Learning within the Discipline of Gerontology

Researcher(s)	Term	Definition
Peterson (1976 & 1980)	educational gerontology	“Educational gerontology is the study and practice of instructional endeavors for and about aged and aging individual” (1976, p. 62). The combination of adult learning and social gerontology, which included three interrelated aspects: education for older persons, education for the public about aging, and educational professional or paraprofessional that work with older persons (Peterson 1976 & 1980).
Agruso (1978)		Examine teaching and learning in later life.
Glendenning (2000)		Refined Peterson’s description of educational gerontology by using the term gerontology education to describe these four components, social gerontology, advocacy gerontology, gerontology education, and professional gerontology, which are not closely related to the instruction of older people. Used the term educational gerontology when discussing the instruction of older people: instructional gerontology and senior adult education.
Yeo (1982)	Eldergogy	Suggested the term elderygogy to be used as the third gogical label following pedagogy and andragogy. Elderygogy would be the education of elders.
Hartford(1978)	geragogy / gerogogy	Suggested a new class of education for the education of the old called geragogy. The next step of education from pedagogy to andragogy, to geragogy. Geragogy is the education of, and by, the elderly. The components of geragogy should include: self-pacing, social interaction, activity based, focus on talents of each learner, and continuous learning.
Battersby (1987)		Gerogogy should be developed on the basis of existing research and theory in three areas: human development of older adults, teaching of older adults, and learning of older adults.

<i>Researcher(s)</i>	<i>Term</i>	<i>Definition</i>
John(1988)		The term geragogy is used to describe the process involved in stimulating and helping the elderly persons to learn. John defined the elderly as "persons who cannot function without assistance in society; although they once could do so, age-related factors now prevent their complete independence" (p. 14).
Ruth, Sihovola, & Parvianiene (1989)		Educational gerontology is the special branch of gerontology that studies educational questions in aging, but the area of study that focuses on the educational aspect of the elderly is gerogogy. This includes developing didactic principles and instructional means for the elderly.
Glendenning (1992)		"Gerogogy or geragogy refers to those issues and practices that are relevant to teaching and learning in relation to older people: memory, cognitive development, coping with transition and change in later life, teaching theory and method, learning theory, realization of full developmental potential and a philosophy which underpins the whole conceptualization as being controlled by the person concerned" (p 15).
Maderer & Skiba (2006)		"... geragogy has several relationships: to the social sciences and psychology of aging, as well as to the biology of aging and geriatrics. On the other hand, the concept of geragogy should be located as the third part of agogy much like pedagogy and andragogy (which infers that the geragogy is not part of andragogy or education of older adults). This is why we prefer to use the term geragogy which involves (a) geragogical research, (b) a geragogical action theory, as well as (c) geagogical practice, founded on a metatheory" (p. 132).
Lemieux and Martinez, (2000)	gerontagogy	Divided the field of educational gerontology into geragogy and gerontagogy. Geragogy is concerned with the instruction of elderly presenting deficits while gerontagogy is the part describing the learning of the elder based upon education versus geriatrics.

Note: Adapted from various sources, which are referenced within the table.

Practical Application for Older Adults Learning

Although, many researchers have debated the terminology to use when discussing and researching the way older adults learn (Battersby, 1987; Glendenning, 1992, 2000; John, 1988; Lemieux and Martinez, 2000; Peterson 1976 & 1980) or even the need for an older adult learning model that differs from andragogy (Peterson, 1983; DeCrow as cited from Bolton, 1978), few researchers now dispute the fact that older adults can learn (Bass, Caro, & Chen, 1993; Rowe & Kahn; Schaie, 1996;). Early literature created an image of older adults as frail and mentally less capable, but many of the results from this early research have been rejected and research and attitudes toward older adults and their ability to learn have changed (Drewery, 1991). The following section focuses on the research that addresses older adult's ability to learn, how they learn, and the special needs of older adult learners.

Older Adults Can Learn

As people continue to live longer and live those years in increasingly good health, researchers' ideas about aging and the physical and mental abilities of those in later life are changing. Most researchers and adult educators no longer endorse the idea that cognition declines: learning, memory, and intellectual functioning are inevitable and irreversible in later life (Schaie, 1996). The stereotypes of older adults and their inabilities are being replaced by images of active, mentally intact older adults who continue to live full lives and contribute to society. This new outlook on aging has been called successful aging or productive aging (Bass, Caro, and Chen, 1993), and has been defined as the ability to maintain low risk of disease and disease-related disability, high mental and physical function and active engagement with life (Rowe & Kahn, 1998). Generalizations about older adults and their inabilities are outdated.

Research suggests the aging process is individualistic. The use of age as a sole predictor of mental and physical abilities is no longer considered appropriate; it is now believed that as individuals age they demonstrate vast differences in the way they age and maintain their mental and physical abilities (Bass, Carro & Chen). Even into very old age individuals differ greatly in their cognitive capacities and many continue to present cognitively intact (Jeune & Andersen-Ranberg, 2000; Kleigel, Morr, Rott, 2004).

According to McClusky,

...even into the 70's and 80's, and for all we know as long as we live on the functioning side of senility, age per se is no barrier to learning. There is no one at any age, even the most gifted, who is without limitation in learning. Thus limitation per se – age-related or otherwise – should not be our criterion for appraising the capacity of older people for education. We can teach an old dog new tricks for it is never too late to learn. (as cited in McClusky, 1974, p. 329)

Along with research supporting the ability of older adults to learn, there are studies that suggest continued learning can actually slow down specific aspects of aging (Schneider, 2003). In fact, Rowe and Kahn (1998) identified education as the strongest predictor of sustained mental function in later life. While Lamdin and Fugate (1997) discussed the importance of continued education with the adage, use it or lose it, explaining the importance of using the brain just like any other muscle in order to keep it vital. “Brains certainly do age. But aging can be slowed (or made invisible) by active mental exercise in challenging learning situations” (Lamdin & Fugate p. 54). The importance of continued education on cognitive stability has been supported in studies of those within the oldest of the old demographic. Klegel, Zimprich, & Rott (2004) studied 90 centenarians and found that the higher early education and greater number of

intellectual activities maintained throughout life acted as a buffer against becoming cognitively impaired.

In addition to slowing down specific aspects of aging, there is research to support the ability to improve cognitive functioning and reverse cognitive decline through training and practice (Paggi & Hayslip, 1999; Rowe & Kahn, 1998; Schaie & Willis, 1986). Rowe & Kahn found that “elderly men and women who have experienced some cognitive decline can, with appropriate training, improve enough to offset approximately two decades of memory loss” (p. 137). Schaie & Willis studied 229 community dwelling elders to examine whether or not cognitive decline in the elderly that has been reliably demonstrated over a 14-year period of time can be reversed. The researchers’ results suggested the cognitive decline was not irreversible and by incorporating relatively simple and inexpensive educational training techniques, reversal of the intellectual decline can be demonstrated (Schaie & Willis).

How Older Adults Learn

Acknowledging that older adults can learn, it is important to explore how older adults learn. Jarvis (1986) describes three contexts for learning:

Informal learning – the process whereby every person acquires knowledge, skills, attitudes and aptitude from daily living; Non-formal – any systematic organized, educational activity carried on outside the formal system to provide selected types of learning to particular subgroups of the population; Formal learning – the institutionalized, chronologically graded and hierarchical education system. (p. 3)

According to Chen et al. (2008) formal learning is uncommon among older adult learners with only one percent of older adults participating in formal learning activities. Predominately, older adults participate in non-formal and informal learning activities. Non-formal learning includes

any learning provided outside the formal institution settings such as community centers, churches, and resident facilities. While informal learning, also referred to as incidental learning, includes any learning that takes place throughout an individual's daily activities. Fennimore (1997) interviewed 18 centenarians about learning in their second century and found that much of their learning occurred through informal learning such as social interactions, watching television, watching others, and activities such as knitting.

It is well documented that adults can learn in a variety of settings and situations from formal to informal learning. While considering how individuals learn in these various situations, it is important to also consider Gardner's (2006) ideas about how individuals understand the world and intelligence. According to Gardner, there are multiple intelligences individuals can and do utilize including: logical-mathematical, linguistic, musical, body-kinesthetic, interpersonal, intrapersonal, spatial, naturalistic and possibly existential intelligences. Logical-mathematical is the intelligence that aligns with what most think about when thinking about intelligence: IQ or fluid intelligence. It includes logic, numbers, reasoning, and problem solving skills. Those high in linguistic intelligence are good with words and language and score high in verbal IQ. Musical intelligence is demonstrated by those who have an affinity for music, rhythm, and tone. Many are able to sing and play musical instruments. Body-kinesthetic can be seen in those who are in control of their own body movements skillfully such as athletes, dancer, or builders. Those with interpersonal intelligence have a good understanding of others, and communicate and interact well with others, while intrapersonal are introspective, self-reflective and have a high level of self-awareness. Spatial intelligence is the final intelligence of the original seven multiple intelligences, which deals with spatial judgment and the ability to visualize. Naturalistic existential intelligence was later added to recognize

those with the ability to relate and identify nature such as hunters or farmers. The final intelligence that Garner later discussed and has considered for addition is existential intelligence. These multiple intelligences represent the wide range of cognitive abilities individuals have to process the world around them whether that is in a non-formal or informal learning setting.

The Needs of Older Adult Learners

When planning learning activities for older adults, it is important to consider the special needs older adult learners have. A number of studies have suggested that older adults have unique needs such as the need for transcendence (McClusky, 1974) or the need for contemplative reflection about the meaning of their life (Lowry & O'Connor, 1986). Other studies have identified the most important needs of older adults as transportation, health, and safety (Purdie & Boulton-Lewis, 2003) or other physical needs due to decreased hearing, sight, and energy level (Glass, 1984; Peterson) as well as changes related to speed, timing, and memory (Glass, 1984; Twitchell, Cherry & Trott, 1996). The need for educators to pay attention to the seating availability, the temperature of the room, the time of day learning activities are offered, and the location for the training has also been discussed (Fennimore, 1997; Glass, 1984).

In contrast, other suggestions made by researchers about older adult learners' needs do not highlight unique needs, but rather align with established adult learners' needs outlined by Knowles' (1984) model of andragogy. For example, Fennimore (1997) recommended that educators of older adult learners:

1. Develop an orientation toward an "environment for learning."
2. Continually reassess what older seniors want for more meaningful learning opportunities and persist with creative ways of providing this type of learning.

3. Promote self-directed learning experiences, as opposed to focusing solely on the teacher, facilitator or caregiver continually leading the learning process.
4. Acknowledge the learning experiences of elders as they are observed...
5. Use the knowledge and skills of older individuals for program planning, development, teaching and facilitation seniors' learning... (p. 68)

Impacts of Learning in Later Life

The importance of continuing learning activities throughout one's lifespan in order to reduce the risk of intellectual decline is supported by research (Kliegel, Zimprich, & Rott, 2004; Merriam & Cafferella, 1999; Rowe & Kahn, 1998). Moreover, those who continued learning later in life demonstrated increased life satisfaction or quality of life (Cusack, Thompson, & Rogers, 2003; Shapira, Bark, & Gal, 2007; White et al., 1999) and increased engagement and connection to the world (Duay & Bryan, 2008).

Cusack, Thompson, and Rogers (2003) believed that "being mentally fit is key to vital and productive living" (p. 401). Their Mental Fitness for Life research, which consisted of participants taking part in an 8-week series of workshops, demonstrated benefits such as improved self-confidence and self-esteem, renewed energy, optimism, and enthusiasm for life along with increased contributions to their families, relationships, and community. "Educational programs, such as this mental fitness program, are transforming the experience of aging, providing hope to people of all ages..." (Cusack, Thompson, and Rogers, p. 401). Results from the Aldridge & Lavender (2000) survey on adult continuing education in the UK (as cited in Cusack, Thompson, and Rogers, 2003) indicate "The direct health benefits reported were: reduced stress, reduced depression, feeling more positive, achieving goals, and more energy (p.25)".

Furthermore, frail housebound elderly people (Swindell & Mayhew, 1996) and individuals in retirement communities including nursing homes (Jones, 1980, Shapira, Barak, & Gal, 2007; White et al.,) benefit from continued learning. Swindell & Mayhew demonstrated that it may be possible to enrich the quality of life for frail, homebound elderly people through educational programs that utilized teleconferencing. The research included 18 relatively isolated, housebound, frail elder persons age 58-92 who took part in an eight-week educational program by teleconference. The observed outcomes included social networks, memories stimulated, changes in behavior, improvements in the participants' self-confidence and self-expression, and comments from the participants about how the program was good for them and caused them to have uplifting feelings after the teleconference sessions.

Jones (1980) studied the experiences of six patients from a geriatric hospital who chose to participate in an art class at the hospital. Jones found all the participants improved, but found the improvements by one 83 year old woman astounding. The woman was indifferent to her surrounding, was frequently incontinent, and was completely chair bound. Three months after the class started the following observations were made by the medical staff:

Marked physical improvement. Where previously needed two nurses to propel her wheel chair, now wheels herself about unaided. She is still chair bound, but now only required minimal help with dressing and feeding, and is much more co-operative with staff. Washes herself, cleaner in her habits, completely continent ... Brighter mentally, Most dramatic improvement noticed by all staff, and her daughter, who says she is brighter and easier to talk to.... P. 47.

While Jones recognized it would be unwise to assume the art class was responsible for all of the changes that occurred, he explained, "Bearing in mind all the provisos, however, improvements

some quite dramatic, are the rule wherever educational activity provided in a residential home or geriatric hospital” (p. 48).

White et al. (1999) also studied participants in independent living and skilled nursing facilities. White et al. saw a trend toward decreased loneliness among those participating in computer and Internet training. The finding first of all supported the fact that older adults in these facilities can learn how to use a computer to access the Internet, and suggested that doing so could improve life satisfaction of these individuals. Shapira, Barak, & Gal (2007) provided some additional research about the affects of Internet training on the well-being of 22 older adults with a mean age of 80 who lived in nursing homes. This research considered both Internet training and other learning activities. The 22 participants were compared to 26 older adults in a comparison group who participated in other learning activities such as painting and sewing. The results demonstrated that the Internet training showed a significant improvement in life satisfaction, depression, loneliness, and self-control while deterioration in all of these measures were detected in the comparison group. As with the White et al., (1999) study, the findings reported were based on a small sample suggesting that additional research in the area of computer training and its affects upon the life satisfaction of older adults in retirement living facilities is needed to continue to support these findings.

Along with increased life satisfaction and quality of life, learning can provide a strategy for staying involved with the world (Duay & Bryan, 2008). Duay & Bryan interviewed 36 older learners on effective and ineffective learning experiences who felt effective training allowed them to remain actively involved with friends, family, and the world. One 88 year old participant stated

Even if I went to them and didn't understand everything, I learned one thing. Even if I learned just a half a thing, it was something. And it was getting out. Just getting out and being with people and doing something different. Getting out is important. (p. 1075)

These findings support the importance of education for successfully aging regardless of the individual's age or living arrangements. Rowe and Kahn (1999) defined successful aging as a combination of avoiding disease, sustaining engagement with life, and maintaining high cognitive and physical function. They also indicated continued engagement in meaningful learning activities was vital to achieving this type of aging. In addition, Duay and Bryan (2006) suggested that successful aging involved engaging with others, coping with change, and maintaining physical, mental, and financial health and identified the learning process plays an important role in this process. Based upon interviews with 18 senior adults about the role of education in the process of successfully aging, they found these senior adults felt learning was an important part of successful aging, while providing them a social experience, a coping strategy, and a way to have fun.

To further summarize the importance of education on successful aging, life satisfaction, and continued connection to the world, consider how Nordstrom and Merz (2006) summarized the importance of lifelong learning through quotes they heard during conversations with older adults who continue to participate in learning activities.

- “I found a passion, the joy of learning”
- “a community of help”
- “keeps me in the mainstream”
- “it helps me be not just protoplasm, but provides me an opportunity to make choices”

- “stimulating, I meet people of like interests”
- “keeps me involved in learning new things”
- “provides an occasion to get dressed up on the morning”
- “fills up my time, my mind is always working on ideas from the program”
- “keeps me alive!” (p. 58)

Participation: Who, What, Why

Even with the vast amount of literature supporting the importance and benefits of learning in later life (Boulton-Lewis, 2010; Lamdin & Fugate, 1997; Rowe & Kahn, 1998; Schaie & Willis, 1986), few older adults continue to participate in learning activities (Fisher, 1986; Kump & Krasovec, 2007). There are a number of studies regarding who participates, what activities older adults participate in, and why older adults participate.

Who participates

There is a tendency for women to participate in education more frequently than men (Lamdin & Fugate, 1997; Ostiguy, Hopp, & MacNeil, 1997), those with higher education levels participate more than those with fewer years of education (Lamdin & Fugate, 1997), and white collar workers participate more often than blue collar (Lamdin & Fugate, 1997).

What learning activities older adults participate in

Those older adults who chose to participate in education, participated more often in music or art related crafts, travel, literature, current events, family history, health and nutrition, and self-actualization rather than learning for a new career, home repair, community development, and languages. (Lamdin & Fugate, 1997). Boulton-Lewis et. al. (2005) (as cited in Boulton-Lewis, 2010) found that older adults want to learn about technology, new activities,

and leisure interests while Boulton-Lewis (2010) found older adults want to learn new things, new talents, new skills, vocations, and technology.

Why older adults participate in learning activities

The question about why older adults participate in learning activities is more complex than the statistics of who and what. Houle (1961) identified three motivational types for adult education: goal-oriented, activity-oriented, and learning-oriented. Goal-oriented individuals used education as a way to accomplish a clear-cut objective they wanted to achieve, for example, going back to school to get a degree in order to get a higher paying job. Activity-oriented individuals participated in learning activities typically with no correlation between the purpose and content of the activity. An example of an activity-oriented learner would be someone who joined a book club due to loneliness rather than the interest in reading a particular book. The learning-oriented person learns for the sake of learning. These individuals are driven by the desire to know versus a specific goal or objective. Boshier (1971) tested Houle's typology of motivational orientation by developing the Education Participation Scale and determined that the motives for participation were more complex than identified by Houle. Boshier and Collins (1983) concluded a six-factor model regarding adult learners' motivation was more appropriate. Social contact, the first of the six factors model, featured participants who wanted to make friends and participated to be involved in group activities. Social stimulation participants used learning as an escape from boredom or frustration while professional advancement participation was primarily due to a desire to achieve a higher work status or advance their career. Community service participants used education as a means to become better citizens and external expectation included participants who became involved because some authority expects it, such

as licensing or other mandatory education. Finally, people enrolled in educational activities because they enjoyed learning for its own sake; it was a cognitive interest.

Boshier (1978) modified the six-factor model when considering older adult learners motivations. The adapted motivational factors include: escape/stimulation, social welfare, social contact, and cognitive interest.

Utilizing Boshier's modified version of Education Participation Scale to assess the motivational factors of 198 older adult learners participating in a Learning in Retirement Institute, Kim & Merriam (2004) found cognitive interest to be the strongest motivator for learning with social contact as the second. Bynum & Seaman (1993) also assessed the motivational factors of members in a Learning in Retirement Institute by administering a modified version of the Reasons for Participation Scale (Furst & Steel, 1996 as cited in Bynum and Seaman, 1993) to 452 older adults. The authors concluded that intellectual curiosity, similar to Boshier's cognitive interest, and social contact were the primary motivations with intellectual curiosity presenting as the strongest motivator.

Gaps Identified

As the researcher reviewed the current older adult learning literature, gaps were identified. First, there is little research about the application of learning theories with the oldest of the old (Battersby, 1987; Peterson, 1983). Secondly, the older adults' voice is missing. There are few studies about what older adults want and need (Boulton-Lewis, 2010; Winthall, 2006). Third, rarely does the older adult learning research include the over age 85 demographic referred to as the oldest of the old (Chen et al., 2007). Studies that do include the over age 85 demographic typically focus on the medical aspect of this group of individuals versus learning, such as the cognitive capabilities of the oldest of the old, as well as the genetic disposition and

life style required to live into later life. Fourth, there is a need for additional research about informal and non-formal learning activities. According to Chen et al. (2007) much of the research done with older adult learning is focused upon formal learning while few older adults participate in formal learning activities. Lastly, there is a lack of research regarding the impact environment has on older adult learning. Williams and Monteplore (1998) explained

No research has yet explored the significance of seniors' residential environment on learning interests and delivery mechanisms... what has yet to be examined is whether one's living arrangement – whether it be in an institutional facility, retirement community, or typical neighborhood household – has any impact on interest in and delivery mechanisms for older learning. (p. 701)

The gaps in the current research highlight the need for additional research with the oldest of the old to better understand the learning experiences of these individuals and allow them an opportunity to have their voices heard. Therefore, this study focused on the learning experiences of the oldest of the old in care facilities in a Midwestern state.

Summary of Research

This chapter provided an overview of the research available about older adult learners to include how older adults learn, who participates in older adult learning activities and why. The researcher also noted the gaps in the current research that were identified. Chapter 3 explains the methods that were used to perform this research; from the philosophical assumptions that guided the research design to how the data was analyzed.

Chapter 3:

METHODOLOGY

Qualitative research methods were utilized to better understand the learning experiences of individuals, age 80 and over, in care facilities. This chapter explains the methodology by discussing the participants and sampling, research design, data collection, data analysis, trustworthiness, and ethical considerations.

Since understanding is pertinent to the study, qualitative methods and philosophical assumptions were utilized. According to Bogdan and Biklen (2007) the goal of qualitative researchers is “to better understand human behavior and experience. They seek to grasp the processes by which people construct meaning and to describe what those meanings are” (p. 43). Qualitative studies typically do not start with a theory and test that theory; rather, they develop an understanding through the data collected utilizing inductive reasoning (Creswell, 2009). The goal is to understand the participants’ perspective rather than to provide proof or causation.

Participants and Sampling

Eight participants age 80 or older, both male and female, who reside in care facilities, participated in the in-depth interviews in this study. These participants were selected from two pre-selected facilities in a rural setting and two in an urban setting. Two urban facilities were chosen by the researcher based upon location and accessibility; one of the rural facilities was selected due to its affiliation with one of the urban facilities. The final rural setting facility was selected due to its location: the researcher’s home town.

Purposeful sampling was utilized to select the participants from the pre-selected facilities. Fraenkel and Wallen (2009) explain this as a sampling technique that allows the researcher to select the participants who were most beneficial for the study. One of the biggest disadvantages

to this type of sampling is the researcher's judgment as to who should be included in the study may be wrong (Fraenkel & Wallen, 2009). But purposeful sampling for this project allows the researcher to select an able and willing group of participants. To mitigate the researcher's judgment error in the purposeful sampling, the researcher met with staff at the chosen facilities to help determine which individuals were most able and willing to participate in the study. This technique did not provide a random sample, which is not needed in this research due to the goal of the study, the qualitative methods being utilized, and the acknowledgement that the intention is not to generalize the finding of this study to a population outside the participants in the study.

The researcher worked with the facility to obtain access to the individuals. Throughout this study, faculty and family members were welcome to take part in any aspect of the research with the participant's permission or request.

A consent form was explained and signed before moving forward with any data collection (See Appendix A). No participants had any difficulty reading or signing the consent form. Voluntary participation was emphasized.

Research Design

This qualitative study focused on learning activities that included both informal and non-formal learning of those individuals over age 80. The kinds of activities ranged from the process of acquiring knowledge, skills, and attitudes from daily living to participation in organized educational activities provided by the facility. Due to the age range and the desire to look at both informal and non-formal learning activities, this study focused on the over age 80 demographic in care facilities in a Midwestern state. By focusing this study around those individuals in institutional settings, the likelihood of an offering of non-formal learning to which the participants have access was higher than those for older adults who continue to live on their own.

There was no consideration given to older adults participating in formal learning in a college or university setting in which grades are provided.

In order to truly understand the learning experiences of the oldest of these learners, a qualitative research design with phenomenological research methods was used while a constructivist's epistemological framework guided the study.

Epistemology: Constructivism

An epistemological framework has been referred to as the nature of knowledge by Merriam (2009) and how the researcher knows what she or he knows by Creswell (2007). The epistemological framework guiding this study was the constructivist framework. Creswell (2007) explains that constructivist researchers

seek understanding of the world in which they live and work. They develop subjective meaning of their experiences... These meanings are varied and multiple, leading the researcher to look for the complexity of views ... The goal of research, then, is to rely as much as possible on the participant's views of the situation (p. 20).

The guiding tenets of constructivism and qualitative research are evident throughout this study to include the decision to utilize phenomenological methods. With the need to understand older adult learners' shared experiences with learning, phenomenology was the best suited approach (Creswell, 2007).

Methodology: Phenomenology

To understand the learning experiences of the older adults' in care facilities, a qualitative research design with phenomenological research methods were used. The goal of a phenomenological study is to understand the essence of the participants' lived experiences around a specific phenomenon (Creswell, 2009; Moustakas, 1994). Bogdan and Biklen (2007)

explained that, “researchers in the phenomenological mode attempt to understand the meaning of events and interactions to ordinary people in particular situations” (p. 25). This researcher, who has not lived the experiences, explored the essence of learning as an older adult from those who have. This was done by talking to and getting to know the participants, through the process of semi-structured interviewing, and observing the learning activities in which they participate.

While attempting to understand this phenomenon, it was important the researcher acknowledged any preconceived ideas or prejudice about learning in later life or the oldest of the old learners. It was vital to set aside those assumptions, as much as possible, in order to view the phenomenon from a fresh perspective (Creswell, 2007). This is referred to as bracketing (Bogdan & Biklen, 2007) or epoche (Moustakas, 1994).

Procedures

This study used a variety of data collection methods including: document review, interviews, and observation. As a qualitative researcher, the researcher relied on the participants to help drive the results captured by these tools and take an active role in the research.

Document Review

The researcher explored the variety of learning experiences offered within the four facilities chosen for the study. To do this, the researcher secured schedules for all activities available, which was used to determine which learning opportunities to observe. The researcher reviewed brochures about the activities and any materials used within the learning activities observed.

Observation

The researcher observed two different learning activities at each facility. The researcher observed how materials were presented and how learners reacted to the learning activities. This included observation of whether adult learning concepts Knowles (1990) outlined were utilized; these concepts include adult learners bring a great volume of life experience, are self-directed and autonomous, need to know how learning will benefit them, and are life, task, or problem-centered. The researcher looked for these concepts throughout the training experiences. This could include allowing opportunities for the learners to share their experiences, engaging the learners with stories and activities that tapped into their lived experiences, allowing the learners to provide input into the topics and or content covered, offering tasks or problems to solve, explaining to the learners what the learning activities were, and ensuring the learners were treated with respect and continued encouragement. Along with observing the application of Knowles' adult learning model, the researcher also made note whether the special physical needs of the learners were met such as room temperature, size of the visuals provided, volume of the speakers' voice, length of the learning activities, and accessibility to the learning activity. Field notes were taken during each learning activity observed.

One-on-one interviews

There were eight participants who participated in the one-on-one interviews in this study. These participants were selected based upon recommendations from the staff at the facilities chosen for the study. These interviews were conducted with a semi-structured approach. This interview approach was selected to provide some level of consistency between the participants, as each participant was asked the same set of questions. However, this also provided a more

informal and conversational atmosphere in order to allow the participants to speak freely and drive the conversation in the direction they want it to go (Russ-Eft and Preskill, 2001).

In order to gain the rich descriptive data needed to understand the lived experiences of the participants, the researcher performed three interviews with each participant. According to Seidman (2006), “ Interviewers who propose to explore their topic by arranging a one-shot meeting with an “interviewee” whom they have never met tread on thin contextual ice” (p. 17). The three-interview series was developed by Dolbeare and Schuman (as cited in Seidman, 2006) and is recommended for the in-depth, phenomenological interviewing process. The three-interview series involved conducting three interviews with each participant. The first interview was a focused life history, which was used to gather information regarding the participants’ experiences related to the topic up to the present time. The second interview provided an opportunity for the participants to give the details of their current experiences related to the topic. And the third interview was a time to reflect by asking the participants to make meaning of their lived experiences.

Each of these interviews was done face to face at the facility in which the participant resides. The interviews were approximately 30 to 60 minutes depending upon the participant. As recommended by Seidman (2006), the three interviews were typically spaced two days to one week apart with one exception when interviews two and three were conducted the same day. The interviews were audio recorded and transcribed by a professional transcriptionist.

Data Analysis

A constant comparative method of analysis was used to try and fit the data collected from all observations and interviews into categories or themes that emerged as they were collected. The constant comparative method is a process where the researcher simultaneously collects and

compares data in order to develop categories in which to fit the data (Anfara, Brown, & Mangione, 2002). This method of comparison begins early in a study and is often nearly done when data collection is complete (Bogdan & Biklen, 2007). This illustrates the core of qualitative analysis: comparison. The researcher looks for themes, codes these themes, and looks for classifications. This analysis is a systematic process that continued through saturation, the time in which no new categories can be found from the data (Creswell, 2007). Merriam (2009) states, “Without ongoing analysis the data can be unfocused, repetitious, and overwhelming in the sheer volume of material that needs to be processed” (p. 171). Once the initial piece of data is collected, the researcher began the process outlined by Merriam (2009)

... read and reread the data, making notes in the margins commenting on the data.

You write a separate memo to yourself capturing your reflections, tentative themes, hunches, ideas, and things to pursue that are derived from this first set of data.

You note things you want to ask, observe, or look for in your next round of data collection. After your second interview, you compare the first set of data with the second. This comparison informs the next data collected and so on. (p. 71)

Throughout the data collection and analysis process described above, the researcher employed three important phenomenological analysis techniques: epoche or bracketing, phenomenological reduction, and horizontalization. “In epoche, the everyday understandings, judgments, and knowings are set aside, and the phenomena are revisited” (Moustakas, 1994, p. 33). Prior to collecting any data, the researcher had to put aside any preconceived ideas or prejudgments about older adults learning experiences and focus on what was actually observed. This process of bracketing required a continued conscious effort by the researcher throughout the data collection and analysis process. In order to maintain focus on what was actually happening,

the researcher used the field notes to capture any assumptions or judgments that occurred. Once the data collection and data analysis process began, the process of phenomenological reduction began. The purpose of phenomenological reduction is to continually focus on the phenomena itself and describe in textual language exactly what one sees (Moustakas, 1994). Moustakas (1994) explained that this “task requires that I look and describe; look again and describe; look again and describe; always with reference to textural qualities... Each angle of perception adds something to one’s knowing of the horizons of a phenomenon” (p. 91). The researcher looked and described, in detail, what was seen and heard during the data collection process. The observation skills of the researcher and the field notes taken during observations and interviews were critical. The researcher also returned to the data throughout the data analysis process to allow for additional reflection and description about what was collected. Once the data were collected and the coding process began, the horizontalization process was utilized. This is the process of laying out all the data and giving each equal value and weight (Merriam, 2009).

The coding process used included both open and focused coding. Open coding was used to identify themes and categories that emerge without imposing any predetermined categories (Esterberg, 2002). To do this, the researcher began by going through the data line by line and making notes of any themes that emerged from the data. Once a number of recurring themes were established, the researcher began focused coding. This again involved going through the data line by line, but this time focusing on the identified key themes (Esterberg, 2002). This two step coding process allowed the researcher to analyze, code, and organize the data into the key themes or categories.

Trustworthiness

To establish trustworthiness within a qualitative study, terms such as credibility, transferability, or conformability are used (Creswell, 2007). Anfara, Brown, and Mangione (2002) discussed strategies to achieve each of these qualitative terms for quality and rigor, along with how to establish dependability. These strategies include the use of prolonged engagement in the field, member checks, and triangulation to achieve credibility; thick description and purposive sampling for transferability, creating an audit trail and a code-recode strategy for dependability; and the practice of reflexivity and triangulation to achieve conformability.

To achieve this level of trustworthiness, researchers need to clarify the rigor of the process, be diligent in establishing their biases, and explaining each and every decision made from design to analysis. Anfara, Brown, and Mangione (2002) stated, “We call for qualitative research to be written with enough clarity and detail so that someone else is able to judge the quality of the study and accept or refute the findings” (p. 33). Along with the procedural explanations, the researcher must also tell the story. The narrative format provides a vehicle to which the researcher can answer the question “why” through the voice of the participants. This is an opportunity unique to qualitative research and one that provides the reader a front row seat to the heart of the research.

Triangulation of Data

The term triangulation of data is often used in qualitative research to help establish trustworthiness in the study (Bogdan & Biklen, 2007). Triangulation of data is used to build verification strategies within the research to help maximize the trustworthiness of the study. This can be achieved in a variety of ways including collecting data from a variety of sources, methods, and/or researchers (Anfara, Brown, & Mangione, 2002; Merriam, 2009). This study

triangulated the data by collecting data from a variety of methods: document review, observations, and interviews. The use of interviews from multiple sources and multiple interviews from each source was also utilized to provide triangulation of the data.

Member check

The member check is another way to ensure the credibility of this study (Anfara, Brown, and Mangione, 2002; Merriam, 2009).

This is the single most important way of ruling out the possibility of misinterpreting the meaning of what participants say and do and the perspective they have on what is going on, as well as being an important way of identifying your own biases and misunderstanding how hat you observed. (as cited in Merriam, 2009, p. 217)

To complete this step, the researcher asked each participant if they wanted to go through the transcription from the interview; one participant did want to review the transcription while all other participants waived the opportunity to do this check. All participants simply wanted to hear how the research turned out and read the final copy of the research when completed.

Ethical Considerations

Ethical considerations are another vital factor to consider when conducting a qualitative study. To ensure the human subjects were protected throughout this research process, this proposal was approved by the Institutional Review Board at Drake University before any data was collected. After approval was provided, the researcher identified and made contact with the participants. Participants who agreed to be a part of this study were provided the following guidelines to ensure they understand their rights throughout the process:

- Involvement in the study is voluntary and the participants can withdraw at any time.
- During interviews, the participants can skip any questions they do not wish to answer.

- Pseudonyms were used to protect the identities of the participants, both in the raw data provided to the transcriptionist and in the final dissertation.

Summary

This chapter provided a detailed description of the philosophical assumptions, methodological approach, and the research design for this qualitative study. The qualitative research with phenomenological methodology allowed me to work directly with the participants in this study to understand their learning experiences in care facilities in this state.

Chapter 4:

FINDINGS

The findings of this qualitative study overwhelmingly supported the notion that older adults, age 80 and over, in care facilities can and do still learn. Through the review of documents, interviews, class or activity observations, and discussion notes, several themes emerged through the constant comparative analysis of data. The eight participants, whose profiles are described in this chapter, learned through both informal and non-formal learning, highlighted the importance of sharing their learned experiences, and explained how vital learning was to their successful aging and current life satisfaction.

Participant Profiles

The participants included seven women and one man over the age of 80 who live in retirement facilities. They ranged in age from 80 – 95 and lived in independent living or assisted living sections of rural or urban care facilities. Each participant was interviewed three times for approximately 30 – 60 minutes. The first interview was used to capture life history information, the second to discuss current learning, and the final interview was spent reflecting on the learning throughout their lives. The participants were identified using pseudonyms. There were two individuals who were excluded from the study; one due to dementia and one due to lack of participation in learning activities. Following are brief descriptions of the participants in order to introduce them prior to explaining the study's findings.

Catherine

Catherine is 89 and she graduated from college with a degree in physics in 1945 and also went to graduate school for two additional years. She taught physics at a university for a few years before she had her first child. After her first child was born, she stopped working and

moved because her husband finished his doctoral degree and took a faculty position at a university. She was in the college environment most of her life but did not teach or have a career after starting her family. Catherine and her husband had three children. They loved to travel and after his death she has continued to travel, indicating she has been on at least 70 trips abroad and wants to spend her 90th birthday in Swaziland where her granddaughter is in the Peace Corp. Along with travel, she enjoys reading, taking classes at an area college, and working at the care facility handling the money for one of the stores in the facility. She currently lives in the independent living area of the facility.

Elizabeth

Elizabeth, 95, went to a country school through eighth grade then on to high school. After she graduated from high school, Elizabeth held a variety of jobs; she worked as a nanny, waitress, cook, and at a motel. She and her husband had two children. Her husband passed away about 30 years ago, and she has been living in the independent living facility for five years. She loves cooking and still cooks and bakes for friends and family. She also enjoys going to exercise class and socializing with friends and family.

Marie

At 89, Marie has a high school education. Following high school, she was married and had four girls. She was a housewife and was a member of church and school committees. Marie painted many of the pictures hanging in her home, but does not paint much anymore, although she has been taking a ceramics class at the retirement facility. She also attends exercise classes three times a week, plays cards, and enjoys spending time with friends and family. She has lived in the independent living facility for about six years.

Marjorie

Marjorie is 94. She went to country school for six years before she was told she was ready for high school. She was able to take and pass the high school entrance exam even though students typically went to country school for eight years. She graduated high school in 1934, and she attended college graduation with a major in mathematics in hopes of going into the insurance business due to her actuarial science background. Prospective employers told her they did not hire women so she became a school teacher since that was a field open to women with college degrees. She taught for three years then got married and moved to a small town where her husband had gotten a job as a dentist. After relocating, she tried to get a teaching job but was told that they do not hire married women. She was able to find work occasionally as a substitute teacher but ultimately became a volunteer librarian. Marjorie continued her work as a librarian until her husband became ill when they moved into the care facility. She has been in the independent living facility for about ten years. She and her husband enjoyed traveling and her hobbies included needlework, pottery, painting, and reading. With the development of macular degeneration, she has limited eye sight but uses assisted devices to read and do puzzles, and she listens to books daily. She also loves to exercise and attends exercise classes daily.

Robert

Robert who is 91, graduated from high school in 1938 and college in 1942 with a degree in journalism. He had additional training in the military and took additional college classes through the Air Force in electronics, radar, and radio school. After the war, he worked for the local paper and then started working at an insurance company where he worked for 39 years retiring at age 65. He took advantage of a variety of learning opportunities through his employer to include a visiting scholar program, which allowed him to go study in England for three

months. In retirement, Robert organized trips for retirees to travel all over the world. He continues to take classes at a local university, does volunteer work, exercises everyday and just got remarried. He has lived in the independent living facility for 12 years.

Ilene

Ilene is 81 and went to country school through second grade then went to town for school and graduated high school. Following high school, she went to college, received her teacher's certificate, and taught elementary school. She taught for 21 years before becoming a substitute teacher and retiring about 22 years ago. In retirement, Ilene and her husband spent much of their time traveling. Ilene continues to enjoy music, theater, reading, attending classes at the facility, volunteering, and participating on a variety of committees. She and her husband moved to the care facility seven years ago; her husband is in the skilled nursing while Ilene resides in the independent living section of the care facility.

Jenny

Jenny, 87, went to country school through eighth grade then went to town for high school and played basketball on the high school team. After high school graduation, she went to business school for about half a year. But she did not have the money to continue so she started working for an equipment company. She said this was during the war so companies were in need of people to do this type of work; the women did not work on the big machines, but were needed to help with the lighter work. She quit this job to get married and had two children. After marriage, she worked for the school system, did alterations out of her home, and was also involved with church work, 4-H groups, and with various committees. She and her husband retired in 1987 and spent their time traveling across the country in their mobile home. Jenny

continues to enjoy painting, quilting, and reading. She is currently in the assisted living section of the care facility.

Sarah

Eighty year old Sarah went to a one room country school through eighth grade then to town for high school. After high school, she worked at the local elevator weighing trucks. She got married when she was 18 and worked on the farm with her husband until her three kids were grown, then she worked at a sewing factory. Sarah likes to crochet, knit, bake, and sew clothes and other items with her sewing machine. She retired four years ago from the local cleaners where she made alterations. She was recently able to move into the assisted living facility from a skilled nursing facility about six months ago.

Table 4.1

Summary of Participants

Name	Sex	Age	Living Arrangements	Rural or Urban Setting	Educational Level	Career
Catherine	F	89	Independent Living	Urban 1	Bachelors Degree	Teacher / Housewife
Elizabeth	F	95	Independent Living	Rural 1	High School	Various
Marie	F	89	Independent Living	Rural 1	High School	Housewife
Marjorie	F	94	Independent Living	Urban 1	Bachelors Degree	Housewife / Volunteer Librarian
Robert	M	91	Independent Living	Urban 1	Bachelors Degree	Insurance Business
Jenny	F	85	Assisted Living	Urban 2	High School	Various
Sarah	F	80	Assisted Living	Rural 1	High School	Housewife / Sewing Factory Worker
Ilene	F	81	Independent Living	Urban 2	Bachelors Degree	Teacher

Care Facilities

Four facilities were selected for this study: two in urban areas and two in rural areas. Both urban facilities were located in a city with a population over 500,000. The facilities offer independent living, assisted living, and skilled nursing and have approximately 200-300 residents. The rural facilities were from much smaller cities with populations of 4,000 and 6,000. One of the facilities did offer independent living, assisted living, and skilled nursing while the other facility only offered assisted living. The rural facilities had approximately 50 residents and 10 residents respectively.

Table 4.2

Summary of Facilities

Facility	Size of City	Size of Facility	Independent Living	Assisted Living	Skilled Nursing
Urban 1	500,000+	approximately 300 residents	X	X	X
Urban 2	500,000+	approximately 200 residents	X	X	X
Rural 1	6000	50 residents	X	X	X
Rural 2	4000	10 residents		X	

Document Review

The document review included the review of activity schedules from each facility. These schedules are created weekly or monthly and include a calendar that lists the daily activities. These were reviewed to determine what types of activities are available at each site.

Urban 1

Urban 1 provided a plethora of activity opportunities each day. These included fitness options each week day for a variety of fitness levels such as aqua fitness, total body conditioning, strength and stability, maintaining strength, friend's fitness, yoga, and seated strength. Arts, music, or crafts were also available each weekday to include poetry reading, crafts, musical guests, folk dancing, trips to the symphony, and arts classes. Additional opportunities included discussions about current events, book club, and reminiscing. During the three months I reviewed the schedules, different classes were offered such as Igniting Intelligence, Tai Chi, Life Bios, The Old Testament, and The Art of Possibility. Social events on the schedule were gather and gab, coffee and donuts, movie nights on Saturday evenings, the out to lunch bunch, bingo, trips to the science center, grocery store, mall and library. Church services and singing hymns were available on Sundays as were devotionals, communion, bible studies, and rosary throughout the week.

Urban 2

In offering a large number and variety of opportunities, Urban 2, had three different activity schedules each month: one for independent living, one for assisted living, and one for the skilled nursing unit. Each of the schedules focused on what they called the FitSix as a guide to healthy living and well-being. With this focus, they provided activities from six categories: intellectual, social, vocational, physical, spiritual, and emotional to address the needs of the whole individual. The assisted living and skilled nursing units had similar offerings to include: exercise classes, trivia, bingo, current events, golf cart rides, baking cookies, book club, movies, church services and devotions, coffee and chat, musical guests, puzzles, kick ball, table talk, spelling bee, card games, fishing, and bus rides to the country. The independent living offered

many of these options along with various levels of fitness classes for strength and balance as well as yoga. In addition many opportunities were offered to play games such as cribbage, bridge ping pong, pitch, rummy, 500, scrabble, and Wii-bowling. Guest speakers and live music are also offered weekly. A couple additional differences with the independent living schedule were the classes offered each month and variety of committee meetings held with members of this group.

Rural 1

Rural 1 did not offer the number or variety of activities available at the urban facilities, however, they were able to offer more than Rural 2. The schedules revealed: fitness classes, card games, bingo, ceramics, trivia, bible study, cookie decorating, van rides, church, coffee, men's pool league, wine and cheese parties, Delay the Disease Parkinson's and Healthy Choices that Taste Good, and Lawrence Welk on TV.

Rural 2

Rural 2 offered exercise, sing-a-longs, bingo, current events, brain teasers, church, bible study, coffee and snacks, beach ball toss, hallway walking, Lawrence Welk and Wheel of Fortune on TV, and movies.

Class / Activity Observations

Along with reviewing the schedules of activities, I also observed two activities at each facility. While observing these activities, I took note of the materials presented and how the participants reacted to the learning activity. This included observation of whether adult learning concepts Knowles (1990) outlined were utilized. This could include allowing opportunities for the learners to share their experiences, engaging the learners with stories and activities that tap into their lived experiences, allowing the learners to provide input into the topics or content

covered, providing tasks or problems to solve, and ensuring the learners are treated with respect and continued encouragement. Along with observing the application of Knowles' adult learning model, I also made note if the special physical needs of the learners were met such as room temperature, size of the visuals provided, volume of the speakers' voice, length of the learning activities, and accessibility to the learning activity.

Urban 1

To determine which activities to attend, I discussed the available options with each of the participants from the Urban 1 facility. Participants Marjorie and Catherine both recommended the current events meeting as this is one Marjorie attends frequently and enjoys. Catherine recommended the Igniting Your Intelligence class since it was a newer option taught by an intern working at the facility. Therefore, I observed a current event meeting and the Igniting Your Intelligence class.

Current events.

The current event meeting was facilitated by the participants. There were ten individuals in attendance and one of them took the lead of the meeting and proposed current event topics to the group. She brought in the newspaper and brought up topics based upon the headlines. Participants were able to share thoughts they had and bring up any additional topics. The group was able to direct the conversation as desired and everyone in the group was engaged for the hour long discussion about a variety of topics.

Igniting your intelligence.

The Igniting Your Intelligence class was facilitated by an intern on the staff. This class consisted of 12 individuals who were asked to play a game similar to Scattergories. Each individual was provided a packet that included one page of instructions and three pages used to

play the game. The handouts were created with very large print so the participants could read the pages on their own. The facilitator explained the instructions before starting the game and continually provided a review of the instructions as needed. The game consisted of choosing a letter randomly, which was then used to provide an answer to each of ten categories that started with the given letter. For example: if the letter was R and the category is fruit, one available answer was raspberry. One answer was provided for each category and one point was awarded for each unique answer. As I observed, all the participants were having fun. Some letters and categories were more difficult than others, but all involved were able to provide answers for most of the categories. When it was time to go around the table and find out what word everyone used, the participants explained their answer and on some occasions had to explain what their word was. For example, puce was used for a color while liatris was used as a flower and many were not familiar with this color or flower so the participants had to explain. This provided the time for everyone to work on their own and come up with their answer, but also allowed them to share their answers and often times stories about the words they came up with. One participant used pound stone as a word and explained that her grandma used one while another participant used Philco refrigerator as a work and talked about her memories when thinking back to that time. It generated some great conversations and a lot of laughs.

Urban 2

At the Urban 2 facility, I discussed the activity schedule with Participant Ilene and the activities director for the assisted living and skilled nursing section of the facility. Ilene suggested the Chronicles class and the activities director suggested I attend Table Talk.

Chronicles...exploring history.

Chronicles...Exploring History is a class held each month to discuss a variety of topics. This class is facilitated by a former history professor. It is set up as a roundtable discussion with pre-work for each participant to complete before attending. A list of options was originally created by the facilitator to include topics such as the Roaring 20's, women's struggle for equality, the rise of Hitler, the Holocaust, the causes of the great depression, Mormonism, the Civil Rights movement, the Cold War, and same sex marriage. From the list of topics, the participants selected what they wanted to discuss. They were also given the opportunity to come up with their own topics to discuss.

The class I attended covered the topic Roe v. Wade / Religion and Politics. Each participant was provided five questions before class. They were asked to answer a minimum of one question before attending that class, which allowed the participants to decide what they wanted to focus on and which questions they wanted to research for the class. There were about 20 participants who all sat at a group of tables that were set up in a square so all participants could see each other. The facilitator began the discussion by asking someone to give background about Roe v. Wade. He then passed around a microphone for anyone who wanted to share. He continued to rely on the participant's ideas and learned experiences throughout the class. He asked for group discussion on every question and facilitated the discussion rather than directing or monopolizing the conversation. The facilitator ensured everyone's opinions and ideas were encouraged and respected; with a topic such as this, that is a vital component to the success of the discussion. The participants echoed the facilitator's comments with sentiments such as, "We all have different experiences that affect our opinions and beliefs," or "We need to acknowledge and recognize each other's experiences as they help to form our beliefs and opinions," and "We

all have values and freedom; respect each other.” The facilitator ensured the class ended on time, reiterated how much he enjoyed learning from them, and then allowed the participants to select the next topic. Most stayed after the class was officially over to continue talking.

The participants were engaged during the entire hour session. They all came prepared and ready to add their thoughts about the topic. Some brought magazine and newspaper articles, others had notes from their research, and some had an i-pad with them and did additional research during the discussion. Every person participated in the discussion and many shared personal stories about how *Roe v. Wade* affected them and their opinions on the topic.

Table talk.

The table talk activity was held in the skilled nursing section of the care facility with nine individuals attending from both assisted living and skilled nursing residents attending. We all sat around a table while the activity director selected from a deck of cards with questions on them. The first question asked was, “What is your all time favorite movie?” The first response was from a gentleman who explained it might not be his favorite movie, but the one he remembers the most is the first movie he went to with sound and how he tried to explain to his father what it was like to hear the horses running as they crossed the screen. This generated others to describe their experiences with silent movies and their favorite movies. The next question was, “Describe an invention during your life time.” This again generated an amazing discussion from everyone as they talked about how much refrigeration changed their lives and the medical advances they have seen. With these two questions, the group talked for over an hour about so many things; everyone was engaged and added their experiences to the conversation. The facilitator simply asked the questions and allowed the participants to direct where the conversation went and what they wanted to discuss and share.

Rural 1

With my initial visit to the Rural 1 facility, Participants Marie and Elizabeth wanted to know before we even started the interviews if I was planning to stay for the wine and cheese party that evening. They explained they have this the last Friday of every month and it is one of their favorite activities. During each of our subsequent interviews, they both also talked about how much they loved their exercise class and the instructor. They go every Monday, Wednesday, and Friday. Therefore, I chose to attend the wine and cheese party and their exercise class.

Wine and cheese party.

The wine and cheese party, held each month, and open to the public is for all the residents, staff, families, friends, or community members. There were over 50 people in attendance and tables were set up throughout the room with appetizers and drinks available at the front of the room. Due to our interviews, Marie and Elizabeth were late to the event and a number of people were waiting for them as they entered the room and had chairs saved for them at their usual table. Both women spent their time mingling with other residents and family members. Marie told me, “You cannot learn anything by just sitting in the corner; you have to get up and talk to people.” She also said that you have to be happy and smile, because that is what makes life fun. Both Marie and Elizabeth talked with a variety of people throughout the hour and a half we stayed at the event; they knew everyone. As we walked back to their rooms, they talked about how much they loved social events to see all the residents, and all the family members, and member of the community they have met through the years.

Exercise class.

The exercise class had about 10 participants who worked on balance, strength, and hand / eye coordination. The facilitator addressed each of the participants by name and engaged each of them in conversations about their lives and his. They shared stories, laughed, and all participated at the level they could. The facilitator also explained each of the exercises including how to perform the exercise, why he was asking them to do the exercise, and how doing that exercise will help them with their daily function. He had a great rapport with the group and was able to get the most out of all of them.

Rural 2

At the Rural 2 facility, I discussed with Participant Sarah which activities to attend. We decided on the brainteasers and current events.

Brainteasers.

Five residents attended the brainteasers session, which consisted of a staff member reading terms out of a book and asking the residents to determine what the term is referring to. For example: “What does the cowboy term buck up mean?” or “What does it mean if a waitress said they needed an Adam and Eve on a raft?” or “They need it without the tears.” If the residents could not come up with the answer, the facilitator would provide the answer.

The initial examples were too difficult for the residents, and the facilitator had to provide many additional clues and often the answer. When they moved to the waitress slang, the residents were able to answer most of these questions and were able to generate some additional discussions about their experiences. When the terms were too difficult, the residents became a little frustrated, but they were much more engaged and had fun when they were able to come up with more of the answers on their own.

Current events.

The current events session was attended by four participants who sat around a table and a staff member read the local paper aloud to the group. One of the stories was about fund raising for the city hall building, which included some history about the building and a fire in the building in the 1940s. The staff member asked the participants if they remembered the fire. This did generate some great discussion among the participants about the history of the city hall building and the changes they have seen.

Themes

The overarching research question was: What are the learning experiences of individuals, age 80 and over, at care facilities in a Midwestern state? By using the constant comparative data analysis method along with open and focused coding, four themes emerged from the data collected. These themes provided a glimpse into the learning experiences of individuals over age 80 in care facilities in a Midwestern state. The themes include:

1. Overwhelming participation in both non-formal and informal learning
2. Learning through travel and exercise
3. Motivation for learning: cognitive interests and social aspect
4. Positive impacts of learning in later life

Participation in Both Non-formal / Informal learning

For the purposes of this research Jarvis's definitions for informal and non-formal learning were used. According to Jarvis, informal learning, also referred to as incidental, is "the process whereby every person acquires knowledge, skills, attitudes and aptitude from daily living" (Jarvis, 1986, p. 3) while non-formal learning is "any systematic organized, educational activity carried on outside the formal system to provide selected types of learning to particular subgroups

of the population” (Jarvis, 1986). Through the interviews, I learned there was overwhelming support for both non-formal and informal learning as every participant took part in both types of learning. All participants were involved in some type of non-formal learning such as classes offered at the care facility as well as classes offered at a local university, and every participant also learned through daily activities, social outings, reading, and watching television, which are examples of informal or incidental learning.

The review of activity schedules revealed that every facility offered a variety of non-formal learning opportunities to include classes such as life history, Chronicles, Igniting Intelligence, Tai Chi, Life Bios, The Old Testament, The Art of Possibility, Delaying Disease, and a variety of exercise classes. Along with this, each facility also provided opportunities that fostered incidental learning to include: sing-a-longs, musical performances, crafts, poetry reading, van rides, wine and cheese parties, cookie decorating, movie nights, men’s pool league, gather and gab, bingo, trips to the mall and library, and a variety of games.

Non-formal learning experiences.

All of the participants took part in classes offered through the retirement facilities. For example, Participant Marie was participating in a life bio class, which guided the participants through activities to reminisce and record sections of their life biographies each week. Ilene was participating in the Chronicles classes, which discussed various topics in history each month while Participant Robert was participating in The Art of Possibility, which he described as a positive thinking course that was taught by a woman who wrote a book about her adventures going around the world in a sail boat. Participants Catherine and Robert also attended classes at a local university. This was possible through an organization at the university for retirees. To be eligible to take these classes, one must be over 65 and retired. There are no credits for the

classes and no grades provided. The classes typically meet four or five times for a couple hours each session. Catherine signed up for seven classes this year and Robert signed up for five. Robert said he had nine last year, but had to cut back this year because he is busy.

Informal learning experiences.

Each of the participants talked about how they learned through the classes they attended, but they also talked extensively about informal learning. Marie said that she learns everyday and learns just by visiting with people. Elizabeth agreed when she said, “Our life, you learn just by associating with all the people”. Ilene participates in numerous non-formal learning classes, but also recognizes that you can learn a great deal from activities with friends. She said, “You learn a lot through them and people that you meet here have such varied backgrounds.”

Marjorie also participates in a variety of non-formal classes at the resident facility, but she explained that she also continuously learns throughout her day. She explained

Learning isn't something you're aware of, it is just something that you do and it has to do with what you enjoy and in the process of it, you learn. I just think it's a kind of a fulfillment, I suppose. You feel good, you enjoy it and then you feel good that you've learned something. Just, for instance, did you know that there's always a Friday the 13th every year? See, that was something that I learned yesterday.

Marjorie sees learning opportunities in everything she does. I saw this type of incidental or informal learning with all the participants as they described learning through watching television, reading, doing puzzles, playing cards, and at social gatherings. Sarah said,

...try to play cards to get your mind a going, I do that here, that's one thing I do, play solitaire. You have to do a little thinking with that...watching TV, you can learn from that. I watched a show on WWII on channel 11.

However, not everyone initially agreed with the idea of informal learning. Catherine had questions from the very beginning of our interviews about the term learning and what it takes to have real learning occur.

I still keep worrying about this word learning, you're doing a lot of things but you're not actually learning, intentionally, not intentionally, that isn't why you're doing it. You do it by osmosis, it just creeps in accidentally. Well that is how I learned about the arts through my husband because I hadn't taken any classes but just being with him all the time and going to these.... It just absorbs by osmosis.

While Catherine may still struggle with this incidental or unintentional learning as true learning, she was able to recognize that you can learn through means outside of formal or non-formal learning activities.

Marjorie also explained how unintentional learning occurred at her country school because all grades were in the same one room and even when it was not your time for a lesson, you could still hear the other kids' lesson. She explained that this type of learning is common and occurs through every day experiences such as talking with people or even listening to television.

So as a child, I remember just sitting there and listening and watching and looking at the map as they pointed out things so that I was getting a lot more knowledge than just my one class. So I think that's the kind of knowledge that most of us get really, you get it unconsciously, maybe you aren't even aware that you are learning. ... [for example] talking to people or listening to TV, even.

Learning Through Travel and Exercise

While a variety of both non-formal and informal learning experiences were discussed by each participant and offered at each facility, learning through travel was the most commonly discussed learning experience, and exercise was the one activity that each participant indicated they currently participate in.

All but two participants fondly reminisced about how much they enjoyed traveling in retirement and all they learned during these trips. Ilene said,

...we did travel a whole lot.... Lot of newspaper reading, books, that kind of thing, but traveling was a real learning experience and that was a lot of fun. You know that's a real learning experience and then when you see the news on TV and you read you've been there and you can identify some of the streets and where you were with all these uprisings. It's just you know, fits together a lot better, so I've learned a lot through our travels.

Robert said,

...travel is a learning experience; I've learned a lot from the travel. For example, when I went to Mexico I went there for archeology, and went down and saw the archeological stuff there. The two go together; reading and travel are good ways for individual growth.

Robert and Catherine both talked about how much they enjoyed going on Elderhostel tours.

Catherine said,

I like them best because it has a certain kind of person that goes on these trips because there are lots of lectures. Now the minute Americans learn there are going to be lectures, they couldn't be less interested and they are serious lectures usually, but they are given

by people from the country and very outstanding people. Usually the whole morning will be lectures and then afternoon you go walk around and see things, so then the people that go on them are very interesting, very casual. You stay in hotels, not five star hotels, which are the same the world over, but places the people of the country might stay. You learn a lot more about the country doing these trips. I really, think they were the ones that I really like best, though I did go on several big Smithsonian's, which are pretty good, too.

Robert said, "We were impressed with Elder Hostel. They had an ambassador traveling around giving talks, no they called it a road scholar. ...took a lot of trips with Elder Hostel."

Marjorie and Elizabeth also talked about traveling a lot and both spent time in Arizona during the winters. Marjorie said,

After my husband retired, we did a lot of traveling. We had a home in Arizona and went out there in the winter, which was a learning experience in itself with the fact we were 20 miles from Mexico.

While Jenny talked about traveling the United States, "We had a mini home and we just took out and we spend six months going to the east coast and six months on the west coast. Pretty much every state..."

While most participants talked about learning through travel after retirement, only two of the participants talked about upcoming trips: Catherine and Robert. Catherine said she has traveled abroad at least 70 times. She used to go on about four trips a year, but has cut that back to going abroad once a year since she moved to the independent living facility. I asked if there are places she hasn't been that she still wants to see, she said

No, not really, I'm getting to where I'm repeating quite a bit, but it's getting interesting because I went many years ago so things have changed. This last summer I took a granddaughter with me, so that was fun taking the granddaughter.

The next trip Catherine would like to make is to spend her 90th birthday in Swaziland with her granddaughter. Robert is also planning another trip to England after his wedding this year.

While not all participants are still able to travel or have trips currently planned, all the participants talked about the importance of exercise. Marjorie, at age 94, exercises every day; she goes to work out class each morning, which she described as "the most difficult one they have" and walks the halls of the retirement home each morning on the weekends. Robert, at age 91, does 100 sit-ups each morning, attends exercise classes at the retirement facility, and still walks on the trails by the facility when the weather allows. Marie, 89, and Elizabeth, 95, each explained that the exercise they attend Monday, Wednesday, and Friday is their favorite activity. Marie said she loves the class and especially the instructor who "keeps telling us that we live longer, or better if we do the exercise. And we do like the exercise." She went on to say she has had some trouble with her legs, but thinks the exercise has been a key for her, "And I think if I hadn't been exercising for the last four years, I probably wouldn't be able to work now, cause their weak and I don't know why they should be, cause I walk a lot, but anyhow they are." Sarah, 80, also said exercise is the most important activity for her, and she would like to do even more if she could.

Motivation for Learning: Cognitive Interest and for the Social Aspect

Each participant was asked why they continue to participate in learning activities. The motivation for learning for most of the participants fell into one of two categories: cognitive interest or learning for the social interaction.

Cognitive interest.

There were a number of participants who responded to this question with an answer that I categorized in Boshier's (1978) motivational factor: cognitive interest. This motivational factor includes learning for the joy of learning and learning for learning sake due to cognitive interest. There were a number of the participants who were motivated by cognitive interest. For example, June said, "I've always just liked to learn, I guess it's just as simple as that." Marjorie said, "Well you know, I basically just enjoy learning, I really do. And I think always enjoy that, learning something new." And Catherine said, "Well, I enjoy them." While Robert said,

Well it's part of the individual growth and from a personal reason, I think you have to keep your brain active to keep those cells growing and not dying, so that's an incentive... plus it's stimulating, makes me a better person.

Learning for the social aspect.

Catherine and Marjorie also indicated they continue to participate in learning activities due to the social interactions. Catherine said, "I also enjoy the people who go to the Ray Society. Very interesting people.... So even to go, you meet some very interesting people." Marjorie said, "Well, I guess I'm an outgoing person. I'm not good; I guess I'm not good company by myself. Yes, I think I am a social person." Marie agreed with both when she talked about participating so she can be with her friends and keep in touch.

Positive Impacts from Learning in Later Life

While most continued to learn for learning sake or for the social aspect of learning, every participant outlined the benefits of learning in terms of maintaining happiness, staying active, in touch with the world, and keeping their minds sharp. When considering how their lives would

be different without continued learning, a single theme emerged around the bleak outlook they would have on their lives.

Benefits to learning in later life.

Each participant was asked, “What are the benefits to learning in later life?” the responses received focused on maintaining happiness and staying active and in touch with the world such as June’s response,

Oh, it just keeps you still active and to be interested in things, I like to learn new things and, I think it’s fun to be around people that have something to say or you know some learning experience, whether it is a newspaper or whatever. So you can share a lot and that and well I just think it would be very boring. You’d sit by yourself and just do nothing; I mean no one is going to swarm around you.

Marie echoed these ideas when she said, “Well, I think it’s a lot in the education, or the newspaper, where you can talk about what’s going on”. She went on to say, “Well it keeps me happy. I don’t hate to get out of bed in the morning.” Jenny agreed that it keeps her going as she explained, “I have something to do, I don’t come down and eat and go home and get in bed and sleep till they pick me up to come down to supper... I want to be busy.” Marie focused on the joy of learning as she stated, “There is a real satisfaction though in learning. I’m not sure I can put words to it, but it gives you a good feeling, it really does, to learn something or to know something. I like it.” Catherine highlighted the benefit of staying in touch as she said, “Well a lot of what I do is current stuff, so I feel I’m up to date on what’s happening in town or I’m fascinated with the Republican stuff.” While Robert captured all of these sentiments as he responded,

The feeling of achievement to a degree, the fact that it makes you a bigger or broader person, anytime I feel good after I exercise cause my body is better. I've done something that helps that I feel good about the learning experiences cause they make me feel good that I've accomplished something I like to have something in the front of me that I'm anticipating, that why I plan travel anticipate that's part of the joy; the experience I think...keep current, find out things that you only know a little bit about and want to know more about.

Other responses focused on maintaining what they currently have. June said, "I don't want to lose it" while Sarah said the benefits include her ability to, "Continue to be yourself. You know, like the sewing, I've sewed for years in a factory and in the cleaners and I would just be lost without that. So, it's yeah, you have to keep learning and doing things."

How life would be different.

Along with the benefits of learning in later life, I also asked each participant how they felt their live would be different if they did not continue to participate in learning activities. The responses highlighted the impact the continued learning has had on their current life satisfaction. Marie said, "I don't know cause I don't even want to think about it." Sarah said, "Oh, well you would be like a dumb zombie." She went on to say, "I've seen some of the older people that just don't care about anything. I don't want to be that way."

June said,

I think you would be very depressed and I really think your health issues would be ten times worse, I think you would dwell on all your little aches and pains and I just think I would really go downhill fast and maybe you hang on for years, but it would be a miserable life.

While Robert said, “I’d become dull. I wouldn’t be as interesting, maybe I would, but I don’t think I’d be as interested in keeping up on things.”

Elizabeth had this advice to those that do not continue to participate in learning activities, “I think they are missing out on an awful lot and as we meet in different places, we try to tell them if there able to at all, to go to exercise class and all these things, it just keep your mind younger. You don’t want to be old and decrepit.”

Summary

To provide context to the findings, the chapter began with a description of the eight participants involved in the study and the four care facilities visited. The results from each data collection method were then discussed to include document review, observations, and themes from the interviews.

Chapter five will provide an overview of the study, a discussion of the findings, conclusions, implications, and recommendations for further study.

Chapter 5:

CONCLUSION

Summary of Study

Through this study I set out to explore the extent and variety of learning experiences for individuals, age 80 and over, in care facilities in a Midwestern state. The significance of this study was highlighted by the importance of continued learning on quality of life and life satisfaction (Cusack, Thompson, & Rogers, 2003; Shapira, Bark, & Gal, 2007; White et al., 1999) combined with the rapid growth of the age group 85 and older, and the lack of research within the older adult learning field which includes this age demographic (Chen et al., 2008; Jarvis, 2001) or their wants and needs (Boulton-Lewis, 2010; Winthall, 2006).

Four themes emerged which provided insight into the learning experiences of the selected participants who felt their learning experiences in later life have been different than in earlier life due to a variety of reasons. In later life, learning has been more intentional; it is done for the joy of learning, yet some found it harder to comprehend as they grew older. Even with these highlighted differences, the participants' favorite learning experiences occurred when many of Knowles' (1990) concepts of andragogy were applied; they all discussed the importance of being able to share their experiences, having a choice in their learning, and the need to understand how the learning will benefit them.

Discussion of Findings

To better understand these conclusions, I will discuss the findings for each research question and how these findings illustrated the essence of the participants' learning experiences.

Is the focus on non-formal learning, informal learning or a combination of the two?

The focus of much of the older adult learning research reviewed by Chen et al. (2008) focused on participation in formal education even though according to the U.S. Bureau of the Census 2005 (as cited in Chen et al., 2008) less than one percent of adults over the age of 65 enroll in formal educational programs within a school setting. Due to this, the focus of this study was on non-formal and informal learning. None of the participants in this study attended formal learning; however, all the participants were involved in both non-formal and information learning. Each participant took part in activities offered through the care facilities and some even attended classes through a retiree group at a local university. Along with this learning, all participants talked about learning through everyday activities such as talking with people, watching television, sewing, reading, and listening to music. The prevalence of informal or incidental learning is consistent with Fenimore's (1997) findings in her study of learning experiences of centenarians. She found that a tremendous amount of learning occurred through social interactions with family, friends, and peers as well as through media such as television, newspapers, mail, books, and magazines. She also found that learning took place through activities such as knitting and physical activity.

Multiple Intelligences.

Each of the facilities did offer a variety of non-formal learning opportunities and also included activities that foster informal learning on their schedules such as gather and gab, coffee, and van rides. When looking at the schedules from each of the facilities, it was apparent the urban facilities had the ability and resources to offer more activities, greater variety in the activities, and additional intellectual opportunities. Only the Urban 2 facility highlighted their efforts to offer a variety of opportunities that address many of the concepts Gardner (2006)

would call multiple intelligences. The Urban 2 facility utilized a program, they patterned after Gardner's multiple intelligences, which focused activities in six areas: intellectual, social, vocational, physical, spiritual, and emotional. Even though all facilities did not have a specific program in place to focus on multiple intelligences, each facility did offer, to varying degrees, opportunities for a variety of the intelligences Gardner (2006) identified. Each facility offered bible study, devotions, and/or church services, which address Gardner's existential intelligence and exercise classes, which address the body-kinesthetic intelligence. The musical intelligence was addressed with activities such as concerts, sing-a-longs, hymns, and The Lawrence Welk Show. While interpersonal intelligence was evident throughout many of the activities, it was especially prominent with the coffee and chat, wine and cheese parties, and other social events. The spacial intelligence was addressed by activities such as art classes and puzzles. The linguistic intelligence was addressed with many of the activities offered at all the facilities. On the contrary, the logical-mathematical intelligence was not a focus for most of the activities. This level of problem-solving and critical thinking was not tapped into at the rural facilities but was seen in some of the classes offered at the urban facilities.

Learning through travel and exercise.

While a variety of both non-formal and informal learning experiences were discussed by each participant, learning through travel was the most commonly discussed learning experience, and exercise was the one activity that all eight participants indicated they continue to participate in. The importance of travel and exercise are supported by Hori and Cusack's (2006) findings that physical fitness and day trips were in the top four interests of all participants in their study. Fennmore's (1997) findings also supported the importance of physical activity and learning as she found that most of the centenarians in her study valued physical fitness. Lamdin and Fugate

(1997) confirmed the frequency of travel as a learning activity with older adults, when they surveyed 860 elderlearners ranging in age from 55 to over 96. In their study, 51.6% of the respondents checked that travel was a significant learning activity they participated in within the last two years. This was second only to the music, art, dance, and arts-related crafts category, which received 58.7% of the respondents checked.

Andragogy: adult learning concepts.

Through the observations of activities at each care facility, I saw many of Knowles' (1990) adult learning concepts utilized. At every facility, with every activity, the learners were treated with respect and continued encouragement. Each facility provided an environment where the participant felt comfortable to share and be safe. Depending upon the activity observed and the facility, additional adult learning concepts were observed including the opportunities for the learners to share their experiences, engaging the learners with stories and activities to tap into their lived experiences, and the opportunity for the learners to have input into the topics and or content covered.

The opportunities for the participants to share their experiences were seen in every activity observed. Some activities were designed to address this, such as the table talk, which provided questions to the participants that required them to answer based upon their experiences. This simple activity generated stories from the participants' childhood and throughout their lives. It allowed each participant to tap into his or her lived experiences and share the stories and what they learned through these stories with the group. The Chronicles class also tapped into the participants' knowledge and how a specific topic in history impacted their lives and their opinions on the subject. Even the exercise class provided opportunities for the participants to share stories and their experiences. This was due to the instructor and his ability to relate the

exercises they were doing to how they will improve daily activities the group want to continue to do and relating all they did back to their lives and needs.

The occasions for the learners to have input into the topics and content covered was also observed. While there is an aspect of choice with all the activities, since the participants get to choose which activities they want to attend, there were also activities that allowed self-direction or what Tough (1975) called self-planning. For example, the Chronicles group discussion class allowed the participant to choose the topics discussed and during class allowed the participants to drive where the conversation took them. The current event discussion group observed at the Urban 1 facility is another good example of self-direction. This group was led by the participants, rather than a facilitator, and they directed what was discussed, how long it was discussed, and when the learning was complete. The self-direction provided in these activities is a key component to Knowles' (1990) adult learning model and what Tough described as self-planning.

Along with observing the application of Knowles' adult learning model, I also made note that the special physical needs of the learners were met relative to room temperature, size of the visuals provided, volume of the speakers' voices, length of the learning activities, and accessibility to the learning activity. This was noted during the Igniting Your Intelligence class when the handouts provided were printed with very large print, during the Chronicles class when the facilitator used a microphone and passed it around to all the participants when they spoke so the group could hear everyone, and during the Brainteaser activity in Rural 2 facility the facilitator did a good job of speaking loud enough and slow enough when posing the questions that all could follow along.

These findings support the continued alignment with Knowles (1990) established adult learners' needs outlined in his adult learning model, which is in contrast to many researchers who continue to debate the need for a new older adult learning 'gogy' (Battersby, 1987; Glendenning, 2000, 1992; John, 1988; Lamdin, 1997). The findings support the Fennimore (1997) recommendations outlined for older adult learners: which included reassessing the desire for more meaningful learning opportunities, promoting self-direction, acknowledging the learning experiences of elders, and including the skills of the older individual for program planning teaching and development.

Why do the participants continue to participate in learning experiences?

The motivation for the participants in this study fell into two categories: cognitive interests and the social aspect. These findings are consistent with Kim & Merriam (2004) who found cognitive interest to be the strongest motivator for older adult learning with social contact as the second. Bynum & Seaman (1993) also assessed the motivational factors of members in a Learning in Retirement Institute by administering a modified version of the Reasons for Participation Scale (Furst & Steel, 1996 as cited in Bynum and Seaman, 1993) to 452 older adults. The authors concluded that intellectual curiosity, similar to Bosher's (1978) cognitive interest, and social contact were the primary motivations with intellectual curiosity presenting as the strongest motivator.

These findings are in contrast to Yenerall's (2003) findings from The University of Third Age in Finland. Yenerall received 347 surveys from older adults, ages ranging from 55–86 with average age of 68, who participated in The University of Third Age courses. The results showed that the number one reason these older learners continued with educational experiences was, to learn more or to gain a general education, while the reason with little support and the lowest rank

was to socialize. These findings do not support the findings of this study, but when considering the older adult population used for the Yenerall study, individuals returning to formal educational setting to take classes, the findings support some differences noted within the participants of this study. Those participants with a college education who participated in classes geared toward education, versus what Participant Catherine called entertainment type classes, all included the concepts of learning for learning sake in their responses. Some also included learning for the social aspect, but all included the cognitive component to learning. In contrast, those without a college education who participated primarily in activities geared more toward entertainment and less on Gardner's (2006) logical-mathematical intelligence, responded they continued learning due to the social aspect.

What is the impact of continued learning on life satisfaction and quality of life?

This study provides additional research to support the positive impact continued participation has on life satisfaction and quality of life, which had already been established by research done by a number of researchers (Cusack, Thompson, and Rogers, 2003; Shapira, Bark, and Gal, 2007; White et al., 1999). The findings also add to the research done by Duay and Bryan (2008), which demonstrated an increased engagement and connection to the world with continued learning activities.

The importance of continuing learning activities in later life was overwhelmingly supported by the findings of this study. This was shown most clearly with the responses from participants when asked how their life would be different if they did not continue to participate in learning activities. The responses included

- "I don't know cause I don't even want to think about it."
- "Oh, well you would be like a dumb zombie."

- “I’ve seen some of the older people that just don’t care about anything. I don’t want to be that way.”
- “I’d become dull. I wouldn’t be as interesting, maybe I would, but I don’t think I’d be as interested in keeping up on things.”
- I think you would be very depressed and I really think your health issues would be ten time worse...I just think I would really go downhill fast.

To further highlight the importance of education on successful aging, life satisfaction, and continued connection to the world, Nordstrom and Merz (2006) summarized the importance of lifelong learning through quotes they heard during conversations with older adults who continue to participate in learning activities. This research supports ideas from Nordstrom and Merz and found similar sentiments from participants such as,

- “It just keeps you still active and to be interested in things, I like to learn new things and I, I think it’s fun to be around people that have something to say”
- “It keeps me happy. I don’t hate to get out of bed in the morning.”
- “I have something to do, I don’t come down and eat and go home and get in bed and sleep till they pick me up to come down to supper... I want to be busy.”
- “There is a real satisfaction though in learning. I’m not sure I can put words to it, but it gives you a good feeling, it really does, to learn something or to know something. I like it.”
- “Well a lot of what I do is current stuff, so I feel I’m up to date on what’s happening in town...”
- “It’s just that I have the drive to do something.”
- “Continue to be yourself...”

Is experience of learning in later life different than the experience of learning during other times in their lives?

Most participants said they felt learning in later life is different than during other times in their life, but none of the participants agreed completely on why it is different. Marie said, “It’s a little harder maybe to comprehend. Yeah, you can let your mind wonder.” Catherine had a different idea as she felt learning was different in later life because it is for pleasure when you get in to later life. Robert saw the difference in the fact that learning is more intentional because you are there for a specific time and for a specific reason. While Ilene’s response had elements of both pleasure and intention,

I think you can do things in depth more. You have a bigger understanding, there isn’t just one side to anything; there are many different issues, it gets very complex.

I think that’s very interesting. I think a person should be introspective,

I mean I try to be and see other views. I just think you have more knowledge because you have had a lot of experiences.... I think you just; it’s a lot of fun to learn more because you have that background and you don’t when you are younger.

You are learning just to be learning like history was just facts, you know, dates and facts and I never enjoyed particularly, but I’m very interested now. You know, you grow, you just have a thirst for more knowledge.

Conclusions

Based upon the findings of this study I drew the following conclusions about the learning experiences of individuals over 80 in care facilities. First of all, learning in later live has an overwhelmingly positive effect on individuals over 80. I referenced many studies that suggested

quality of life and life satisfaction are positively impacted by continued learning; however, most of these studies did not include individuals over 80 in their studies. This study included this demographic and the results parallel the findings of the previously mentioned studies and support that life satisfaction and quality of life for individuals over 80 is also improved; learning matters in these individual's lives. The participants in this study were active, able, and learning daily. They all provided images of individuals over 80 who are successfully aging and living, and I see continued learning as a driving factor of their success.

Along with the impact of learning in later life, I found that these individuals had a passion for learning that existed throughout their lives. The most common motivation for learning was Boshier's (1978) cognitive interest or learning for learning sake. During my conversations with these individuals, most of them talked about their lifetime of learning and their continued desire to learn for learning sake. Boshier (1977) discussed the life-space or growth-motivated individuals as those who participate in learning for self-actualization rather than to satisfy lower-order needs. He stated that life-space motivated individuals "participate in adult education for expression rather than in an attempt to cope with some aspect of their life" (p. 92). I feel the participants in this study demonstrated a life-space orientation and desire for self-actualization throughout their lives, and feel this lifelong stance toward learning for learning sake had a direct impact on the quality of life, life satisfaction, and successful aging I witnessed.

Lastly, I feel Knowles' (1990) model of adult learning, Tough's (1975) ideas about self-directed learning, and Gardner's (2006) multiple intelligences can and do apply to the oldest of the old learners and should be used to create and provide successful and meaningful learning opportunities for these individuals.

Implications

The results of this study align with the vast amount of research that supports the importance of learning in later life (Klegel, Zimprich, & Rott, 2004; Lamdin & Fugate, 1997; Paggi & Hayslip, 1999; Rowe & Kahn, 1998 ; Schaei & Willis, 1986; Schneider, 2004) and the positive impacts continued learning has on life satisfaction and quality of life (Cusack, Thompson, and Rogers, 2003; Shapira, Bark, and Gal, 2007; White et al., 1999), as well as the increased engagement and connection to the world (Duay & Bryan, 2008). The difference with this study is that it included the over age 85 demographic that had previously not been addressed with studies about the importance of learning. With a lack of research that includes the over age 85 demographic, the findings of this study call for a start to building a better understanding of the impacts of continued learning with the oldest of the old.

While the importance of continued learning, even the oldest of the old, was explored with this study, additional results were found by talking with the participants about their wants and needs, which was also an ignored aspect of older adult learning research (Boulton-Lewis, 2010; Winthall, 2006). These discussions revealed that each of the participants had wonderful learning experiences through travel, however, only a few continue to have the opportunity to travel on their own and only one of the retirement facilities in this study offered group travel opportunities. I see this as vital piece to older adults learning and enjoyment, which needs to be addressed by the care facilities. Many of the participants in this study were widowed women who stopped traveling when their husbands became ill or died. They reminisced fondly about their travels and all they learned but appeared to have no option to continue this learning through travel.

In addition to offering travel opportunities to residents, the findings in this study also support the need for care facilities to evaluate what types of learning experiences they offer. The need for a variety of learning activities, which address the multiple intelligences outlined by Gardner (2006), is a need that many of the care facilities met in this study. However, it is apparent the smaller rural facilities do not have the capability to offer the variety and depth of learning opportunities the larger urban facilities can. What resources are available for these facilities to expand their offerings? The importance of this learning and the need for this type of learning is well-documented while the resources to provide this learning are a gap in the smaller rural facilities.

An additional gap found in the activities offered in the care facilities within the study, was the lack of focus on the logical-mathematical intelligence (Gardner, 2006) in most activities. This level of problem-solving and critical thinking was not addressed at the rural facilities but was seen in some of the classes offered at the urban facilities. However, according to Participant Catherine from one of the Urban facilities, she attends classes at the local university because many of the learning activities offered at the care facilities are more entertainment rather than learning. This is important because this study found the participants with a college education were more likely to want classes that included this level of critical thinking while those without a college education leaned toward more social or entertainment type learning that tapped into different intelligences. When considering the increased desire for opportunities to utilize Gardner's (2006) logical-mathematical intelligence with higher education levels, I feel this need is going to continue to increase. The baby-boomer generation is beginning to retire and will soon be entering the older adult demographic and as a whole, this generation has a higher education level than the current oldest of the old demographic. Therefore, the wants and needs

of the next generation of the oldest of the old needs to be considered; as the population becomes more educated, the learning opportunities available to these older adult learners also needs to change.

Recommendations for Further Study

As I reviewed the current older adult learning literature, severe gaps were identified, which guided the design of this study: the lack of older adult learning research that includes the oldest of the old demographic (Chen et al., 2007), few studies about what older adults want and need (Boulton-Lewis, 2010; Winthall, 2006), little research focused on non-formal and information learning even though few older adults participate in formal learning activities (Chen et al., 2007) and the limited research that explores the significance of seniors' residential environment on learning (Willians and Montepiare (1998). These gaps in the current research highlighted the need for additional research with the oldest of the old to better understand the learning experiences of these individuals and allow them an opportunity to have their voices heard. Therefore, this study focused on the learning experiences of the oldest of the old in care facilities in a Midwestern state, which I feel did address many of the gaps found in the research, but additional research that includes these components needs to be done with larger sample sizes and more diversity in the participant population and care facilities studied.

Considering the older adult learning research reviewed for this study and findings of this research in mind, there are still gaps in the research that still need to be addressed. There is a continued need for additional studies that include the oldest of the old demographic. As this age demographic continues to grow, so does the need to include them in future studies. Along with including this demographic, we need additional qualitative studies to hear their voices and get a better understanding of what they want and need as older learners. In conjunction with this, as

we learn more about their wants and needs, additional information needs to be collected to determine what opportunities are available to those in these facilities. Are there gaps in what is offered in rural versus urban facilities?

While studying these wants and desires of the oldest of the old, there is also a need for additional research with the baby-boomer generation about their education and learning needs as they age. This large group of individuals is the next generation to reach the oldest of the old demographic, and the impact of their different wants and needs must be further researched. With these differences in mind, we know those with higher education levels participate more than those with fewer years of education (Lamdin & Fugate, 1997), but additional research is needed in determining how the types of activities in which the individuals participate differ based upon education levels.

I also believe the findings from this study and others provide conclusions that warrant additional research to determine the impact of learning on not only the quality of life but the possibility of prolonged life. Along with this, I would recommend additional research on the impact of an individuals' orientation to learning on life satisfaction and life expectancy.

The final suggestion for additional research is to research why individuals do not participate in continued learning in later life. This study and many of the studies about learning in later life have focused on those who do participate while little research has looked at why non-participants do not take part in continued learning.

Summary

Early literature created an image of older adults as frail and mentally less capable, but many of the results from this early research have been rejected, and research and attitudes toward older adults and their ability to learn have changed (Drewery, 1991). As people continue to live

longer and live those years in increasingly good health, researchers' ideas about aging and the physical and mental abilities of those in later life are changing. Most researchers and adult educators no longer endorse the idea that cognition declines in learning, memory, and intellectual functioning are inevitable and irreversible in later life (Schaie, 1996). The stereotypes of older adults and their inabilities are being replaced by images of active, mentally intact older adults who continue to live full lives and contribute to society. The findings of this study overwhelmingly support this new image of older adults and puts names and faces to this image through investigation of documents, first hand observations, and conversations with these individuals such as Robert, age 91, who said, "I like to be active and I have a lot of energy and you can't go by age particular any more, you have to judge the person rather than the number." This study not only supports this new image of aging but provides examples of individuals over age 80, who have often been overlooked in prior adult learning research, who epitomize this new image. These individuals are living full lives in their 80s and 90s and credit continued participation in learning as a key contributor to their successful aging.

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APPENDIX.

Appendix A. Consent Form

Dear (*insert name*),

My name is Sheila Grebert; I am a doctoral student in Educational Leadership at Drake University. I have completed my coursework and am in the process of writing my dissertation, entitled – We Still Have a Lot To Learn: Learning Experiences of Individuals Age 80 and Older in Care Facilities in a Midwestern State.

You are being asked to participate in a research project. This research is being conducted to satisfy requirements for a doctorate in education at Drake University. The purpose of this study is to explore the learning experiences of individuals, age 80 and over, in care facilities in this same Midwestern state. This will be accomplished by in-depth interviews with selected older adults, review of learning activities scheduled by selected care facilities and observation of learning opportunities in which the older adults participate, when applicable.

The information gained from this study will be used to complete a doctoral dissertation. The following are the terms of participation:

- Participation in this study is completely voluntary.
- The respondent has the right to withdraw at anytime from the study, for any reason, and any information collected from that respondent will be returned to the respondent upon request.
- The respondent will be asked personal questions about their educational background and current thoughts about education and learning. Although this could cause some respondents to feel uncomfortable if they do not want to discuss these topics, there are no foreseeable risks or harm to the participant.
- This will require meeting for three 30-60 minute interviews within a two week time period.
- Real names will not be used during data collection or in the paper.
- The data collected for this study will be stored on a password protected computer. This will include notes from the document review and class observations, and audio recording and transcripts of the interviews.

- The respondent will receive a copy of the transcription and the findings section of the dissertation before the final draft is written in order to negotiate any changes with the researcher.
- The information obtained during this study will be used to write a doctoral dissertation, which will be reviewed by the doctoral committee members. The dissertation will be available to the public once completed and approved.
- The benefit to this study is to better understand the learning experiences of those 80 and older in care facilities. There is little research about the learning experiences of this group of individuals and even less research where the voice of these people is heard. Therefore, the findings from this study can be used by care facilities to better understand the learning experiences of those 80 and older in care facilities.

If you have any questions or concerns regarding this study or your rights as a participant in this study, please contact Sheila Grebert at 515-205-4655 or by email at sheilagrebert@drake.edu.

Additionally you can also ask questions or communicate any concerns to the Drake University Institutional Review Board at (515) 271-3472 or by email at irb@drake.edu.

If you agree to participate in this study according to the above terms, please sign:

Researcher _____ Respondent _____

I (do / do not) grant permission to be directly quoted in the paper.

Respondent _____

Appendix B. Interview Questions

Interview one – Focused life history

- How old are you?
- Tell me about your educational background, including the education level attained.
- Tell me about your career path.
- How long have you been retired? (if applicable)
- Have you continued learning throughout your retirement? Why/ why not? (if applicable)
- What are your hobbies?

Interview two – Details of experiences

- What learning activities do you attend?
- Are there other learning activities you would like to participate in, but they are not offered here?
- Are there other ways you continue to learn other than attending the activities provided by the care facility?
- Why do you continue to participate in learning activities?
- Why do you think others do not continue to participate in learning activities?
- What, if anything, would make the learning process easier?
- What is the best part about continuing the learning process?
- Is learning in later life different than learning during other times in your life?
- How have the continued learning activities affected other aspects of their life?

Interview three – Reflection on the meaning

- Think about a recent learning experience that you have had. What made it enjoyable?
- What are the benefits of learning in later life?
- How would your life differ if you did not continue to participate in learning activities?
- What advice would you give others that do not participate in learning activities in later life?
- Is there anything else you'd like to share about your experiences?